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ABSTRACT

This technical supplement presents various reports on education in Maryland. The text opens by describing education financing in Maryland, sources of revenue, policy goals guiding state aid, and expenditures and spending differences. The report discusses the relative importance of federal, state, and local funding and includes a national comparison, a summary of past studies concerning elementary and secondary education, an overview of Baltimore city public schools reform legislation, and other information. It details state aid and trends in the 1990s and features an overview of education equity, local wealth, and tax efforts. There is a discussion of maintenance-of-effort issues, policy goals guiding state aid, a brief history of state education aid, and various approaches Maryland uses to distribute education aid. The text also describes expenditures and those factors contributing to spending differences among school systems. This discussion includes the report by a task force on dropout prevention, intervention, and recovery and an expert panel discussion of at-risk programs. An overview of the Prince Georges County public school system is included. In each section there is a longitudinal analysis to provide historical perspective. An appendix provides a program- by-program description of many of Maryland's education aid programs. (RJM)

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Task Force on Education Funding Equity, Accountability, and Partnerships

Technical Supplement
Volume I

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Annapolis, Maryland
December 1997

Task Force on Education Funding Equity, Accountability, and Partnerships

Technical Supplement
Volume I

Annapolis, Maryland
December 1997

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Structure of School Finance in Maryland

July 1997

Department of Legislative Services

Annapolis, Maryland

DEPARTMENT OF LEGISLATIVE SERVICES
OFFICE OF POLICY ANALYSIS
MARYLAND GENERAL ASSEMBLY

July 9, 1997

The Honorable Thomas V. Mike Miller, Jr., President of the Senate
The Honorable Casper R. Taylor, Jr., Speaker of the House of Delegates
Honorable Members of the Maryland General Assembly

Public education is one of the most important functions of government. In fiscal 1996 Maryland's school systems expended over $5.7 billion for this purpose. This commitment to the public schools accounts for over 40 percent of spending at the local level. At the State level, State aid for the public schools accounts for over 30 percent of State expenditures funded from general tax dollars. This report summarizes the financing of public education in Maryland. The first section reviews the sources of revenue for education. The next section summarizes State education aid in somewhat greater detail. There is a discussion of policy goals guiding State aid, a brief history of State education aid, and an overview of the various approaches Maryland uses to distribute education aid. The third section discusses expenditures and those factors contributing to spending differences among school systems. In each section there is an examination of trends over a period of years to provide historical perspective. Finally, the appendix provides a program by program description of many of Maryland's education aid programs.

This report was prepared by John Rohrer and Laurie Liddell with administrative assistance from JoAnn Bryan and Betsy Dobbs. Much of the data derives from annual reports published by the Maryland State Department of Education.

The department trusts the General Assembly will find the report useful as it considers education issues this year.

Sincerely,

William S. Ratchford, II
Interim Executive Director

WSR/JWR/brd

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Structure of School Finance in Maryland

Introduction

The State and county governments share responsibility for Maryland's public schools. Statewide educational policy determination is the responsibility of the State Board of Education with the State Superintendent of Schools and Maryland State Department of Education overseeing the implementation of policies and providing administrative support. The 23 county boards of education and the New Baltimore City Board of School Commissioners, together with each local superintendent, govern education matters and policy-making within the school district and oversee the daily operation of the local school system.

This report focuses on the financing of education in Maryland. The first section briefly overviews the relative importance of federal, state, and local funding. The next section summarizes State education aid. In the third section there is a brief discussion of expenditures and those factors contributing to spending differences among school systems. In each section there is an examination of trends over a period of years to provide historical perspective. Finally, the appendix provides a program by program description of many of Maryland's education aid programs.

Revenues

Educational expenditures are funded from federal, State, and local sources as shown in **Exhibit 1**. In fiscal 1996 local revenues accounted for 55.9 percent of the $5.1 billion in revenues supporting the operating costs of the public schools. State aid comprised another 40.3 percent. A 3.8 percent share reflects the relatively small federal role in funding primary and secondary education. The relative shares of funding from each government entity varied little over the ten year period fiscal 1986 through fiscal 1996.

Education revenues grew more rapidly between fiscal 1986 and fiscal 1991 at about 9.3 percent per year than in the period from fiscal 1991 to fiscal 1996 where average annual growth slowed to 4.5 percent (see **Exhibit 2**). On a per pupil basis the difference is even more dramatic: 8.1 percent annual growth over the fiscal 1986 to 1991 period versus 2.0 percent annual growth since fiscal 1991. This diminished per pupil revenue growth in the 1990's reflects both higher enrollment growth and recession driven fiscal constraints at the beginning of the decade. In the earlier period,

Exhibit 1
Education Revenues
By Source
(percent of total)

Category	Fiscal 1986	Fiscal 1991	Fiscal 1996
Federal	4.2	3.8	3.8
State	40.5	39.4	40.3
Local	55.3	56.8	55.9

Source: Selected Financial Data, Maryland Public Schools, Part 1 - Revenues, selected years, Maryland State Department of Education.

Exhibit 2
Education Revenue Trends

	Fiscal 1986	Fiscal 1991	Average Annual Growth	Fiscal 1996	Average Annual Growth
Total Revenues					
Amount (millions)	$2,643.2	$4,124.3	9.3%	$5,147.2	4.5%
Per Pupil	4,109	6,064	8.1%	6,679	2.0%
Federal Revenue					
Amount (millions)	110.6	156.4	7.2%	195.7	4.6%
Per Pupil	172	230	6.0%	254	2.0%
State Revenue					
Amount (millions)	1,070.7	1,625.4	8.7%	2,076.0	5.0%
Per Pupil	1,665	2,390	7.5%	2,694	2.4%
Local Revenue					
Amount (millions)	1,461.9	2,342.5	9.9%	2,875.5	4.2%
Per Pupil	2,273	3,444	8.7%	3,731	1.6%

Note: Amounts do not include revenues for debt service, school construction, or food service.

Source: Selected Financial Data, Maryland Public Schools, Part 1 - Revenues, selected years, Maryland State Department of Education. Per pupil amounts calculated using total enrollment adjusted for half-day kindergarten and prekindergarten programs.

both State and local government support drove the increase in education revenues, with local revenue growth slightly higher. On the other hand, between fiscal 1991 and 1996 the annual increases in State support were slightly above the growth in local funding.

Although State and federal aid accounts for about 44.2 percent of the funding for Maryland's public schools, the reliance on that aid varies across the counties (see **Exhibit 3**). For example, in fiscal 1996 22.5 percent of Montgomery County's revenues were from State and federal sources, the smallest share in the State. On the other hand, Baltimore City received 69.7 percent of its revenues from non-local sources, the largest intergovernmental share. Much of this variance derives from State and federal efforts to target aid to "low wealth" jurisdictions or to school systems with high proportions of students with special needs.

State Aid

Education aid totaling $2.4 billion accounts for over 30 percent of State general fund expenditures in fiscal 1998. The aid includes $1.9 billion in direct aid and $445 million in teachers' retirement payments on behalf of the local school systems. This fiscal 1998 aid is 46 percent higher than the amount provided in fiscal 1991 ($1.6 billion). During the last eight years public education has been a State budget priority. Over this period education aid increases have averaged 5.5 percent per year compared to an average annual general fund expenditure increase of 3.3 percent.

Four Policy Goals Have Guided Funding

Over the past 25 years a number of legislative and executive committees and task forces have reviewed primary and secondary education funding. Many of the recommendations of these study groups have been enacted by the General Assembly. Throughout this period several policy goals guided State funding of the public schools. Among them include the following:

- all Maryland students should have the opportunity to receive a quality education;
- educational opportunities should not depend on a jurisdiction's relative ability to raise revenue from local sources;
- students with special needs may require the commitment of additional educational resources; and,

Exhibit 3

Operating Revenues For Primary and Secondary Education
Fiscal 1996
($ in thousands)

County	Local Appropriation	Percent	Other Local	Percent	State	Percent	Federal	Percent	Total
Allegany	20,675	32.0%	1,110	1.7%	38,122	59.0%	4,673	7.2%	64,579
Anne Arundel	266,479	59.0%	5,791	1.3%	165,091	36.5%	14,337	3.2%	451,697
Baltimore City	199,202	29.2%	7,364	1.1%	417,239	61.1%	58,838	8.6%	682,643
Baltimore	404,783	62.0%	3,383	0.5%	225,219	34.5%	19,800	3.0%	653,185
Calvert	45,104	57.2%	886	1.1%	30,610	38.8%	2,272	2.9%	78,873
Caroline	9,753	32.5%	257	0.9%	18,222	60.6%	1,817	6.0%	30,050
Carroll	75,801	51.7%	1,001	0.7%	66,110	45.1%	3,728	2.5%	146,640
Cecil	36,057	44.5%	768	0.9%	41,415	51.2%	2,714	3.4%	80,954
Charles	59,442	48.0%	2,586	2.1%	58,070	46.9%	3,740	3.0%	123,838
Dorchester	11,322	36.7%	803	2.6%	16,492	53.5%	2,219	7.2%	30,835
Frederick	96,790	51.4%	4,038	2.1%	82,521	43.8%	4,992	2.7%	188,342
Garrett	11,382	36.5%	269	0.9%	17,432	55.9%	2,078	6.7%	31,162
Harford	101,054	48.5%	1,931	0.9%	99,675	47.8%	5,812	2.8%	208,471
Howard	170,840	66.0%	6,563	2.5%	78,088	30.2%	3,457	1.3%	258,947
Kent	10,110	54.6%	197	1.1%	7,114	38.4%	1,082	5.8%	18,503
Montgomery	718,687	76.8%	7,294	0.8%	189,731	20.3%	20,222	2.2%	935,933
Prince George's	385,470	50.0%	15,275	2.0%	345,040	44.8%	24,714	3.2%	770,498
Queen Anne's	20,730	55.8%	388	1.0%	14,737	39.7%	1,302	3.5%	37,157
St. Mary's	36,256	45.1%	679	0.8%	39,129	48.7%	4,261	5.3%	80,326
Somerset	6,580	31.0%	616	2.9%	12,174	57.3%	1,859	8.8%	21,229
Talbot	17,675	65.8%	1,758	6.5%	6,359	23.7%	1,054	3.9%	26,846
Washington	47,037	42.3%	621	0.6%	57,884	52.0%	5,702	5.1%	111,244
Wicomico	28,153	38.0%	1,024	1.4%	41,733	56.3%	3,273	4.4%	74,183
Worcester	31,142	75.8%	404	1.0%	7,771	18.9%	1,772	4.3%	41,089
Statewide	2,810,525	54.6%	65,005	1.3%	2,075,978	40.3%	195,717	3.8%	5,147,226

Notes: 1) Amounts do not include revenues for school construction, debt service, and food service

2) "Other local revenues" are revenues generated by the local school system from tuition, transportation, fees, investment, rentals, gifts, and other sources. "Local appropriations" represent each county's appropriation to the school system.

Source: Selected Financial Data, Part 1-Revenues, published annually by the Maryland State Department of Education

- local school districts have the primary responsibility for the allocation of educational resources; however, certain educational needs, problems, or State policies may require the State to play a greater role.

There Have Been Numerous Funding Changes in Last 25 Years

Between fiscal 1974 and 1998 there have been over thirty significant changes to Maryland's education funding programs. Through fiscal 1991 the changes generally involved increases in the major education aid programs or the addition of new programs. During the State's fiscal crisis in the early 1990's, most of the adjustments involved program restrictions or reductions. In subsequent years most enhancements have been through new categorical programs. The major changes to education funding over the previous twenty-five years are summarized below:

- After its enactment in fiscal 1974, the current expense formula was adjusted on approximately seven occasions through increases to the foundation amount. Adjustments were also made to the State's share of the foundation amount.

- The compensatory education program was established in fiscal 1980 and replaced with a "new" compensatory program in 1985 as part of the "Civiletti" Task Force recommendations.

- In 1977 a public special education formula and a nonpublic placement cost sharing policy were enacted but relatively few funding changes have occurred since then. In fiscal 1988 the special education formula received its first infusion of new funds after being frozen at $70 million in fiscal 1981. A handicapped student transportation grant was established the next year (fiscal 1989).

- Throughout the past twenty-five years several new categorical aid programs have been established. These include such programs as: extended elementary education - 1980; Prince George's County magnet school aid - 1987; Maryland's tomorrow - 1989; challenge grants - 1993; limited English proficiency grants - 1994; targeted poverty grants - 1995; school reconstitution grants - 1996; performance recognition awards, education modernization initiative, and Baltimore County teacher mentoring - 1997; and additional poverty and aging school grants - 1998.

- Between fiscal 1992 and 1994 the State reduced the growth in education aid by: 1) eliminating State payment of social security benefits for certain educational employees; 2) reducing pupil transportation grants; 3) altering the State/local cost sharing formula for nonpublic special education; 4) temporarily holding local school boards responsible for increases in fringe benefit costs associated with general salary increases for local educators; and 5) reducing the mandated increases in current expense and compensatory funding for fiscal 1994.

- The fiscal 1998 budget included $30 million for the Baltimore City public schools consistent with legislation passed by the 1997 General Assembly (SB 795) restructuring the management of the city's school system. The legislation stemmed from consent decrees settling several lawsuits involving the Baltimore City school system. The five year funding commitment in the legislation increases to $50 million annually beginning with fiscal 1999. The legislation also commits about $31 million annually over five years to the other school systems through various programs.

Mandated Grants for Five Purposes Account for Most Education Aid

Currently, the State funds the public schools through over 30 different programs. (See **Exhibit 4** for a three year summary of education aid by program.) Grants for five purposes -- current expenses, compensatory programs, teachers' retirement costs, school bus transportation costs, and special education programs -- account for most of the aid: $2.2 billion or 94 percent of the estimated $2.4 billion in fiscal 1998 aid for operating costs. In addition, the fiscal 1998 State budget includes $82.4 million for debt service on State bonds that funded prior years' school construction projects.

Most education aid ($2.2 billion and 94 percent in fiscal 1998) is mandated by statute. The Governor must include the funding for the mandated programs in the budget submitted to the General Assembly. Reductions to these programs by the General Assembly must result from the re-estimate of those factors determining the funding level or must be specifically authorized by statute. With the exception of $11.3 million in special education funding, aid for the five purposes enumerated above is mandated by statute. Several smaller programs also have a statutorily mandated funding level.

In addition, the Baltimore City school legislation (SB 795) enacted this year includes a multi-year aid commitment of $61.7 million for fiscal 1998 and $81.7 million for fiscal 1999 through 2002. Failure to appropriate this aid in any of the years abrogates the statute and the city school management reforms. This funding commitment under SB 795 accounts for another 2.6 percent of education aid in fiscal 1998. (**Exhibit 4** shows those programs covered under SB 795, as well as those programs mandated by statute).

Exhibit 4

STATE AID FOR PRIMARY AND SECONDARY EDUCATION
F.Y. 1996-F.Y. 1998

Program	F.Y. 1996 (millions)	% OF TOTAL	F.Y. 1997 (millions)	% OF TOTAL	F.Y. 1998 (millions)	% OF TOTAL
CURRENT EXPENSE AID	1,288.4	61.8	1,360.1	61.7	1,455.8	61.4
COMPENSATORY AID	73.7	3.5	76.8	3.5	80.9	3.4
TARGETED POVERTY GRANT	8.0	0.4	8.0	0.4	8.0	0.3
SPECIAL EDUCATION						
PUBLIC	81.3	3.9	81.3	3.7	81.3	3.4
NON-PUBLIC	46.3	2.2	51.7	2.3	61.2	2.6
RETIREMENT	425.8	20.4	449.0	20.4	445.0	18.8
TRANSPORTATION						
FORMULA (BLOCK GRANT)	94.1	4.5	96.9	4.4	102.6	4.3
SPECIAL EDUCATION	3.1	0.1	3.4	0.2	4.0	0.2
CHILDREN AT RISK	10.4	0.5	10.4	0.5	10.0	0.4
GIFTED & TALENTED*	2.1	0.1	1.9	0.1	4.4	0.2
ENVIRONMENTAL ED.	0.1	0.0	0.1	0.0	0.1	0.0
DISRUPTIVE YOUTH	0.4	0.0	0.5	0.0	0.0	0.0
INNOVATIVE PROGRAMS						
MAGNET/NEIGH. SCHOOLS*	15.0	0.7	13.0	0.6	14.1	0.6
CHALLENGE GRANTS	7.6	0.4	7.6	0.3	7.6	0.3
RECONSTITUTED/MARGINAL SCHS.	1.4	0.1	11.7	0.5	1.7	0.1
BALTIMORE COUNTY MENTORING*	0.0	0.0	0.5	0.0	2.9	0.1
MODERNIZATION INITIATIVE	0.0	0.0	1.2	0.1	3.2	0.1
OTHER	0.5	0.0	6.5	0.3	4.7	0.2
ADULT EDUCATION	0.9	0.0	0.5	0.0	0.8	0.0
FOOD SERVICES	4.3	0.2	4.3	0.2	4.3	0.2
COMMUNITY CENTERS	0.7	0.0	0.7	0.0	0.0	0.0
EXTENDED ELEMENTARY	11.6	0.6	11.6	0.5	14.9	0.6
SCIENCE/MATH EDUCATION	0.9	0.0	0.9	0.0	0.9	0.0
ADDITIONAL POVERTY GRANTS*	0.0	0.0	0.0	0.0	18.2	0.8
AGING SCHOOLS*	0.0	0.0	0.0	0.0	4.4	0.2
BALTIMORE CITY PARTNERSHIP*	0.0	0.0	0.0	0.0	33.5	1.4
LIMITED ENG. PROF. GRANT*	7.0	0.3	7.2	0.3	7.8	0.3
DEBT SERVICE-PRE 1971	1.4	0.1	0.3	0.0	0.1	0.0
SUBTOTAL	2,084.8	100.0	2,206.0	100.0	2,372.4	100.0
DEBT SERVICE-STATE	81.1		80.6		82.4	
TOTAL	2,165.9		2,286.7		2,454.8	
GENERAL FUND REVENUES	7,211.0		7,506.4		7,716.8	
% GENERAL FUND	30.0		30.5		31.8	

Notes:

1-Shaded programs are statutorily "mandated" programs: the Governor must include the funding for these programs in the budget submitted to the General Assembly.

2-Current expense aid includes formula aid, tuition by-law, and beginning in FY 1987 out-of-county placements.

3-Nonpublic placement amounts are actuals, not final state budget amounts. FY 1996 and FY 1997 amounts include funds budgeted under Office of Children, Youth, and Families subcabinet fund.

4- Asterisk programs contain a five year commitment for additional aid beginning with FY 1998 under the New Baltimore City Board of School Commissioners legislation (SB 795) including $16.6 million for additional poverty grants; $4.4 million for aging schools; $30 million for Baltimore City Partnership funding in fiscal 1998 and $50 million in subsequent years; $2.0 million for Mongomery County gifted & talented programs; $1.1 million for Prince George's County magnet schools; $2.4 million for Baltimore County teacher mentoring; and $1.9 million for limited English proficiency.

Source: Department of Legislative Services; Annual Maryland State budgets.

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The remaining 3.4 percent of education aid is discretionary. For these programs, funding levels are at the Governor's discretion. The programs may have been established by statute, but the statute does not require a certain level of funding. Excluding the aid associated with the city school legislation (SB 795), there has been little change since fiscal 1991 in the percentage of education aid that is discretionary.

Exhibit 5, which follows, shows county-by-county aid distributions for the major aid programs. **Exhibit 6** shows the aid on per student basis. **Appendix 1** summarizes most of Maryland's education aid programs.

EXHIBIT 5

ESTIMATED STATE PRIMARY/SECONDARY AID FISCAL YEAR 1998

(dollars in thousands)

COUNTY	CURRENT EXPENSE FORMULA	COMPEN- SATORY	SCHOOL BUS TRANSPORT	SPECIAL EDUCATION	TEACHERS RETIREMENT	OTHER PROGRAMS	TOTAL
ALLEGANY	27,454	2,820	2,411	1,297	5,609	1,530	41,120
ANNE ARUNDEL	112,259	2,215	10,185	11,138	39,614	4,144	179,555
BALTIMORE CITY	274,872	48,098	8,905	45,092	54,559	46,272	477,797
BALTIMORE	162,075	4,200	12,711	12,314	56,833	13,699	261,832
CALVERT	25,760	447	1,759	830	6,945	751	36,493
CAROLINE	14,170	754	1,218	496	2,734	1,056	20,428
CARROLL	54,902	660	3,937	2,801	12,744	853	75,897
CECIL	32,937	983	2,207	1,623	7,367	1,445	46,561
CHARLES	43,457	863	4,139	2,644	10,729	1,803	63,635
DORCHESTER	11,648	801	1,221	469	2,621	991	17,751
FREDERICK	68,893	1,122	3,846	3,109	16,428	1,569	94,966
GARRETT	11,984	895	1,555	685	2,786	820	18,723
HARFORD	79,780	1,728	5,122	4,108	18,183	2,157	111,079
HOWARD	56,667	642	4,636	4,042	23,233	1,321	90,542
KENT	4,447	196	810	355	1,600	529	7,936
MONTGOMERY	90,435	2,416	12,234	15,828	82,943	11,858	215,714
PRINCE GEORGE'S	253,169	5,977	17,135	28,119	64,741	27,331	396,471
QUEEN ANNE'S	10,360	279	1,341	550	3,211	610	16,351
ST. MARY'S	30,422	1,157	2,717	2,220	6,990	1,357	44,863
SOMERSET	7,686	610	944	438	1,831	1,034	12,543
TALBOT	2,443	179	771	269	2,242	668	6,572
WASHINGTON	43,122	1,860	3,060	2,571	10,126	1,679	62,418
WICOMICO	32,021	1,762	2,326	1,189	7,199	1,734	46,231
WORCESTER	1,306	247	1,394	252	3,751	728	7,678
STATEWIDE	1,452,269	80,910	106,584	142,437	445,018	125,939	2,353,156

NOTES:
1) Other aid includes amounts distributed under the magnet schools, adult education, county debt service, food service, Maryland's Tomorrow, extended elementary, out-of-county placement, limited English proficient, targeted poverty grant, and gifted and talented programs.
2) With the exception of retirement payments, the amounts reflect aid distributed to the local boards of education. These amounts are allocated on the basis of salaries.
3) Debt service on state bonds issued for school construction and several small discretionary programs are not included.

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EXHIBIT 6
STATE PRIMARY/SECONDARY AID PER FULL TIME EQUIVALENT STUDENT
FISCAL YEAR 1998

COUNTY	CURRENT EXPENSE FORMULA	COMPEN-SATORY	SCHOOL BUS TRANSPORT	SPECIAL EDUCATION	TEACHERS RETIREMENT	OTHER PROGRAMS	TOTAL
ALLEGANY	2,590	266	227	122	529	144	3,880
ANNE ARUNDEL	1,601	32	145	159	565	59	2,560
BALTIMORE CITY	2,786	488	90	457	553	469	4,843
BALTIMORE	1,638	42	128	124	574	138	2,646
CALVERT	1,858	32	127	60	501	54	2,632
CAROLINE	2,679	143	230	94	517	200	3,863
CARROLL	2,158	26	155	110	501	34	2,984
CECIL	2,306	69	155	114	516	101	3,260
CHARLES	2,117	42	202	129	523	88	3,100
DORCHESTER	2,356	162	247	95	530	200	3,590
FREDERICK	2,089	34	117	94	498	48	2,880
GARRETT	2,380	178	309	136	553	163	3,719
HARFORD	2,195	48	141	113	500	59	3,056
HOWARD	1,465	17	120	104	600	34	2,340
KENT	1,654	73	301	132	595	197	2,952
MONTGOMERY	763	20	103	133	700	100	1,819
PRINCE GEORGE'S	2,114	50	143	235	541	228	3,310
QUEEN ANNE'S	1,706	46	221	91	529	100	2,693
ST. MARY'S	2,213	84	198	161	508	99	3,263
SOMERSET	2,657	211	326	151	633	357	4,336
TALBOT	577	42	182	64	530	158	1,553
WASHINGTON	2,264	98	161	135	532	88	3,277
WICOMICO	2,415	133	175	90	543	131	3,487
WORCESTER	201	38	215	39	577	112	1,181
STATEWIDE	1,856	103	136	182	569	161	3,007

NOTES: 1) Other aid includes amounts distributed under the magnet schools, adult education, county debt service, food service, Maryland's Tomorrow, extended elementary, out-of-county placement, limited English proficient, targeted poverty grant, and gifted and talented programs.

2) With the exception of retirement payments, the amounts reflect aid distributed to the local boards of education. These amounts are allocated on the basis of salaries.

3) Debt service on state bonds issued for school construction and several small discretionary programs are not included.

4) Per student amounts based on estimated September 1997 FTE.

Maryland Uses Several Approaches to Distribute Education Aid

Consistent with the four policy goals guiding State funding, it is possible to categorize education aid by method of distribution. Five distributional approaches have been developed to classify the aid: workload measures, combination wealth/workload measures, actual costs, prior year's aid, and other approaches. **Exhibit 7** summarizes the classification of aid by distribution method. The exhibit is followed by a description of each category. As the exhibit shows, two approaches account for over 86 percent of Maryland's education aid: almost two thirds of the aid incorporates measures of local wealth and another fifth directly relates to specific educational costs.

Exhibit 7
State Aid By Basis For Distribution
($ in millions)

	Approp. FY 1998	% of Total
Workload	$ 50.2	2.1
Wealth/Workload	1,544.5	65.1
Actual Costs	506.3	21.3
Prior Years' Aid	172.6	7.3
Other	98.8	4.2
Total	$ 2,372.4	100.0

Workload: Includes programs which distribute aid using indicators of "need" or workload measures. Examples include targeted poverty grants and additional poverty grants (number of students eligible for free or reduced priced school lunches); limited English proficiency grants (number of limited English proficient students); food service aid; transportation for special education students. These programs reflect the policy goal that students with special needs may require the commitment of additional resources.

Wealth/Workload: Several programs utilize a workload measure such as enrollment and distribute aid inverse to local wealth: less wealthy jurisdictions receive relatively more aid. Wealth is usually defined as some combination of property assessable base and net taxable income. Programs utilizing wealth and workload measures include the current expense, compensatory, and special education aid formulas. These programs address the policy goal that educational opportunities should not depend on the relative ability of local jurisdictions to raise revenues from local sources.

Actual Costs: The State pays all or a portion of the actual costs associated with certain educational services or programs. Examples include the State share of nonpublic special education costs and the State payment of employer retirement costs for local teachers. Basing aid on actual costs assists all school systems with providing educational opportunities; however, to the extent wealthier school districts incur higher costs, they receive greater benefits under this approach than less wealthy school districts.

Prior Years' Aid: Aid received in one year is based on or equals the aid received in previous years. Examples include grants for school bus transportation (previous year's aid increased by CPI) and special education aid (aid equals the amount received in fiscal 1981). Beginning with fiscal 1998, the transportation program also incorporates a workload measure (enrollment growth).

Other Methods: This category includes primarily those grants supporting a specific programmatic goal such as improving student performance. Examples are the extended elementary, Maryland's tomorrow, magnet school, and challenge grant programs and the Baltimore City partnership funding.

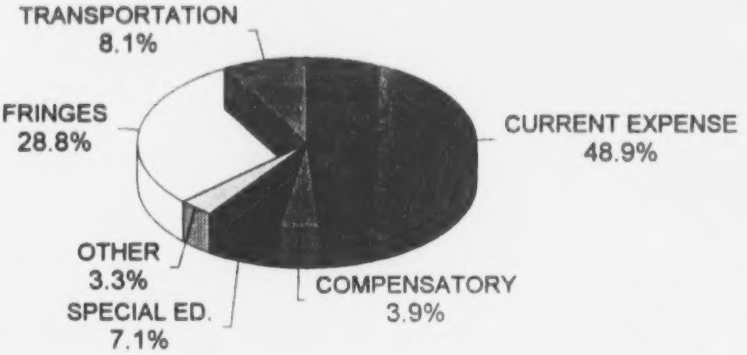
Aid Patterns Have Changed Since the Early 1990's

The changes in education aid beginning with fiscal 1992 have resulted in a significant shift in State aid patterns. As shown in **Exhibit 8**, two programs, current expense and compensatory aid, which distribute aid inverse to local wealth, have grown from 52.8 percent to 64.6 percent of the total over the eight year period from fiscal 1991 to fiscal 1998. Two factors account for this shift: 1) Beginning with implementation of the "Civiletti" Task Force recommendations in fiscal 1985 and the subsequent enhancements in funding in fiscal 1988, annual growth in current expense and compensatory aid has exceeded growth in the other programs; 2) Cost containment actions enacted in 1992 included a significant reduction in student transportation grants and the elimination of State funding of teachers social security costs. Between fiscal 1991 and fiscal 1998 the aid falling into the "other" category has also increased, growing from 3.3 percent to 6.1 percent of aid. This reflects an increasing reliance on smaller categorical aid programs this decade, culminating with the Baltimore City school legislation (SB 795) enacted this year.

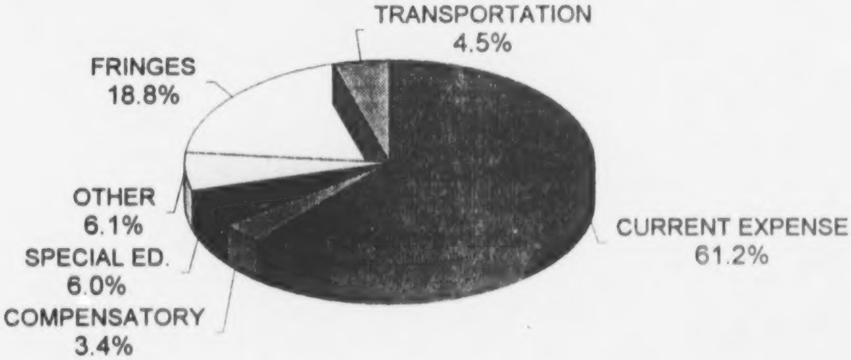
Exhibit 8

State Education Aid
Programmatic Distribution

FY 1991



FY 1998



Source: Department of Legislative Services; Maryland State budgets.

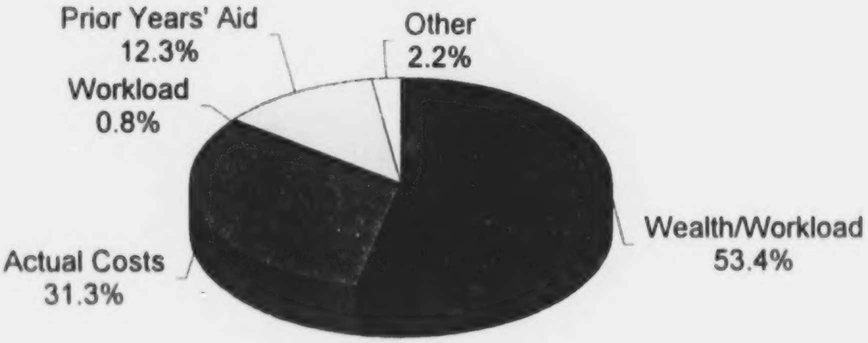
Comparing education aid categorized by distribution method over the same period finds a similar pattern. (See **Exhibit 9**.) In fiscal 1998 65 percent of education aid will be distributed using the wealth/workload combination approach. This compares to 53 percent in fiscal 1991. The proportionate decline in aid based on actual costs and prior years' allocations reflects the elimination of State funded social security costs and the reduction in school bus transportation grants. The slightly greater reliance on other approaches to distributing aid tracks the growth in categorical programs tied to specific educational needs, problems, or State policies.

As a result of the changes that occurred in the early 1990's a greater share of Maryland's education aid addresses the policy goal that educational opportunities not depend on local fiscal capacity or the ability to raise education funds from local sources. There has also been a greater focus on poor school performance through State aid programs targeting funds to specific schools.

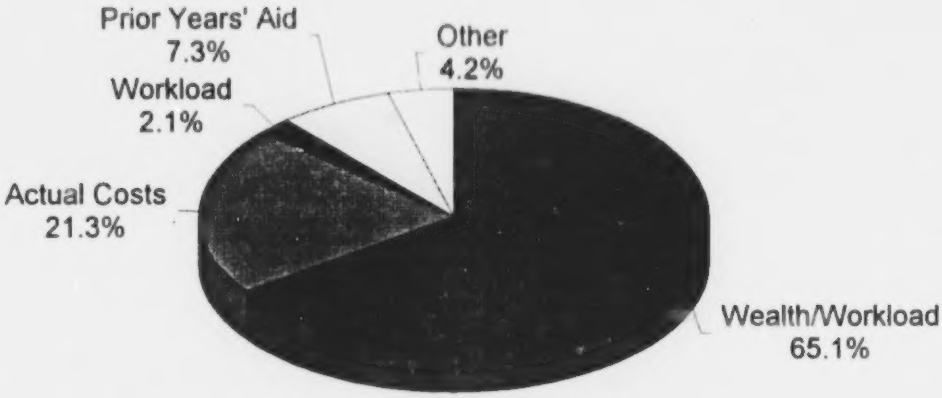
Exhibit 9

State Education Aid Distribution Factors

FY 1991



FY 1998



Source: Department of Legislative Services; Maryland State budgets

Expenditures

Primary and secondary education operating and capital expenditures totaled $5.7 billion in fiscal 1996. This spending for the public schools accounted for over 40 percent of local government expenditures in fiscal 1996. Instructional outlays are the single largest component of operating expenditures followed by special education expenditures. (See **Exhibit 10** for an expenditure summary and **Exhibit 11** for expenditures on a county-by-county basis.)

Exhibit 10
Education Expenditures
Fiscal 1996

Expenditure Category	Amount ($ in millions)	Percent of Operating Expenses
Instruction	$2,974.7	59.1%
Special Education	550.7	10.9
Administration	202.3	4.0
Plant Operation/Maintenance	531.5	10.6
Transportation	275.3	5.5
Other	72.2	1.4
State Paid Retirement	425.8	8.5
Total Operating Expenses	5,032.5	100.0
Nonpublic Special Education	103.4	
Food Services	166.8	
School Construction	377.3	
Interest on Debt	58.3	
Total Disbursements	$5,738.3	

(1) Fringe benefit costs, other than State paid teachers' retirement for which an allocation is not available, are apportioned to the other expenditure categories.

Source: Selected Financial Data, Maryland State Department of Education

Exhibit 11

Expenditures for Primary and Secondary Education
Operating Costs by Function
Fiscal 1996

County	Instruction	Special Education	Administration	Plant Oper/Maint.	State Paid Retirement	Student Transportation	Other	Total
Allegany	39,052,140	6,261,571	2,354,092	7,079,212	5,338,742	3,337,637	1,048,114	64,471,508
Anne Arundel	261,460,628	42,684,986	16,246,818	50,139,297	38,666,806	23,433,654	7,992,929	440,625,118
Baltimore City	354,718,810	110,406,364	28,794,414	68,760,896	52,772,742	27,941,994	5,649,331	649,044,551
Baltimore	397,804,845	64,344,803	24,234,296	67,949,080	53,930,669	26,224,700	10,503,032	644,991,425
Calvert	46,005,786	7,531,089	2,945,558	8,095,896	6,438,661	5,617,474	1,149,098	77,783,562
Caroline	18,424,506	2,529,505	1,408,808	2,274,099	2,541,162	2,140,763	676,434	29,995,277
Carroll	86,193,253	13,035,496	8,009,559	13,660,116	11,892,775	9,755,211	2,306,046	144,852,456
Cecil	48,140,309	8,632,495	3,337,905	8,796,612	6,937,498	4,274,325	729,911	80,849,055
Charles	68,700,010	11,584,936	5,709,217	14,741,908	10,571,762	7,013,189	3,771,877	122,092,899
Dorchester	18,165,089	3,022,826	1,460,897	2,756,580	2,600,944	1,805,306	615,046	30,426,688
Frederick	113,296,660	15,887,590	7,559,157	21,851,413	15,357,694	9,908,436	2,495,734	186,356,684
Garrett	18,180,854	2,633,184	1,226,194	2,830,154	2,610,279	2,353,162	526,841	30,360,668
Harford	125,122,497	18,568,301	6,331,706	21,999,552	16,988,594	13,906,858	2,389,789	205,307,297
Howard	153,986,767	27,413,357	11,688,634	27,229,532	20,737,782	11,753,548	6,165,522	258,975,142
Kent	11,058,195	1,554,739	1,098,555	2,003,715	1,525,805	1,055,887	251,984	18,548,880
Montgomery	567,592,977	97,839,455	34,059,738	83,599,222	79,534,647	48,639,583	4,088,888	915,354,510
Prince George's	412,922,702	81,114,793	28,192,140	89,034,924	62,887,658	55,628,411	14,631,601	744,412,229
Queen Anne's	21,621,776	3,164,155	1,933,365	3,569,132	3,142,252	2,667,420	547,116	36,645,216
St. Mary's	45,387,195	8,276,974	3,873,441	8,380,437	6,739,015	4,845,140	1,389,233	78,891,435
Somerset	12,004,746	1,827,724	1,372,670	1,883,427	1,832,657	1,495,246	758,353	21,174,823
Talbot	16,024,647	2,273,081	1,028,136	2,293,608	2,255,978	1,232,279	1,727,054	26,834,783
Washington	67,710,660	10,127,754	4,447,770	12,340,554	9,899,971	4,244,728	534,810	109,306,247
Wicomico	45,476,231	6,627,824	3,354,595	6,785,434	6,955,611	3,627,056	1,400,641	74,227,392
Worcester	25,611,407	3,347,197	1,635,458	3,473,655	3,658,713	2,444,149	865,523	41,036,102
Total	2,974,662,690	550,690,199	202,303,123	531,528,455	425,818,417	275,346,156	72,214,907	5,032,563,947

Note: Amounts do not include expenditures for debt service, construction, food service, and nonpublic special education placements.

Source: Selected Financial Data, FY 1996 , Maryland State Department of Education

There were significant increases in primary and secondary education expenditures per student throughout the late 1980's. As **Exhibit 12** shows, statewide expenditures per pupil grew 8.0 percent per year between fiscal 1986 and fiscal 1991. However, with the slowdown in State and local revenue growth and rising school enrollments, fiscal 1991 through fiscal 1996 annual per pupil spending increases fell to 1.8 percent.

In fiscal 1996 the difference in spending per pupil between Montgomery and Caroline, the highest and lowest spending counties, was 1.46 to 1. In other words, Montgomery County spent 46 percent more per pupil than Caroline County. This translates into a $2,529 difference in per student spending. Compared to fiscal 1991 spending disparities have declined in the 1990's. In fiscal 1991 the ratio between the highest and lowest spending school systems was 1.7 to one, little changed from the fiscal 1986 ratio of 1.73 to one. The significant decrease in disparity derives from three factors: 1) the greater share of education aid distributed inverse to local wealth; 2) the slowdown in local assessable base growth, especially in those jurisdictions with higher property wealth; and 3) generally higher enrollment growth among the wealthiest counties than among the least wealthy counties.

Spending disparities, however, continue to exist. Five factors account for most of the differences in spending per student:

1. Fiscal capacities - counties have different abilities to raise revenues from local sources.

2. Local effort - other priorities may compete for funding and taxpayer support for education may differ among Maryland's counties.

3. Cost differentials - the cost of providing an average mix of classroom resources (teachers and supplies) varies across school districts.

4. Special student populations - students with special needs cost more to educate and the proportion of special needs students varies among Maryland's school districts. (See **Exhibit 13**)

5. Intergovernmental aid - State and federal aid per student varies considerably among the local school systems.

Exhibit 12
Education Expenditures Per Pupil

County	FY 1986	FY 1991	Average Annual Growth	FY 1996	Average Annual Growth
Allegany	$3,439	$4,866	7.2%	$5,936	4.1%
Anne Arundel	3,872	5,941	8.9%	6,464	1.7%
Baltimore City	3,486	5,178	8.2%	6,208	3.7%
Baltimore	4,622	6,295	6.4%	6,594	0.9%
Calvert	3,974	5,294	5.9%	6,056	2.7%
Caroline	3,132	4,598	8.0%	5,448	3.5%
Carroll	3,305	5,169	9.4%	6,094	3.3%
Cecil	3,351	5,066	8.6%	5,819	2.8%
Charles	3,535	5,299	8.4%	6,076	2.8%
Dorchester	3,784	5,457	7.6%	6,111	2.3%
Frederick	3,515	5,378	8.9%	5,970	2.1%
Garrett	3,357	5,176	9.0%	5,850	2.5%
Harford	3,456	4,981	7.6%	5,875	3.4%
Howard	4,503	7,003	9.2%	7,162	0.5%
Kent	4,056	6,100	8.5%	6,926	2.6%
Montgomery	5,407	7,807	7.6%	7,977	0.4%
Prince George's	4,004	5,878	8.0%	6,287	1.4%
Queen Anne's	3,901	5,515	7.2%	6,178	2.3%
St. Mary's	3,751	5,379	7.5%	5,989	2.2%
Somerset	3,439	5,296	9.0%	6,773	5.0%
Talbot	3,798	5,445	7.5%	6,309	3.0%
Washington	3,793	5,291	6.9%	5,801	1.9%
Wicomico	3,410	5,024	8.1%	5,641	2.3%
Worcester	4,301	6,089	7.2%	6,487	1.3%
Statewide	**4,064**	**5,961**	8.0%	**6,530**	**1.8%**

Note: Amounts do not include expenditures for debt service, construction, food service, and nonpublic special education placements. September 30th enrollment used to calculate per students amounts. Prekindergarten and kindergarten students counted as one-half time if in half-day programs.

Source: Selected Financial Data, Maryland Public Schools, Part II Expenditures, selected years ; Department of Legislative Services.

Exhibit 13
Selected Student Population Characteristics
(1995-1996 School Year)

	Enrollment	% Special Education Students	% Limited English Proficient Students	% Approved for Free/Reduced Meals
Allegany	11,300	13.4	0.0	44.6
Anne Arundel	71,383	12.8	0.6	15.2
Baltimore City	109,980	15.1	0.4	70.1
Baltimore	101,564	11.9	1.3	25.1
Calvert	13,496	11.3	0.1	14.2
Caroline	5,521	14.6	1.0	40.1
Carroll	25,408	12.9	0.3	8.8
Cecil	14,640	15.0	0.2	21.4
Charles	20,966	11.9	0.4	22.6
Dorchester	5,216	13.3	0.6	44.1
Frederick	32,766	12.3	0.4	14.2
Garrett	5,190	13.4	0.0	43.4
Harford	36,820	12.0	0.3	17.3
Howard	37,547	10.8	2.0	9.1
Kent	2,863	11.8	1.5	34.8
Montgomery	120,291	10.6	5.9	21.4
Prince George's	122,415	9.1	3.1	41.2
Queen Anne's	6,271	12.5	0.4	19.5
St. Mary's	13,950	13.3	0.4	27.0
Somerset	3,277	11.7	1.0	53.5
Talbot	4,427	12.6	0.8	25.9
Washington	19,824	14.3	0.9	30.0
Wicomico	13,796	11.3	1.3	33.5
Worcester	6,633	10.4	0.7	35.5
Statewide	805,544	12.0	1.9	31.0

Source: Maryland State Department of Education, 1996 Maryland School Performance Report

Appendix 1

Current Expense Formula ($1,452.3 Million and 61.2% of FY 1998 Aid)

The current expense formula is Maryland's basic support program, distributing over $1.45 billion to the local boards of education. It accounts for about 61 percent of the State's education aid in fiscal 1998. This formula has been a key component of Maryland's education funding since 1973. Legislation enacted by the 1987 General Assembly provides for automatic increases in current expense formula aid. The minimum funding level is based on prior years' actual spending. The $95.5 million fiscal 1998 increase results from higher enrollment ($24.5 million) and prior years' spending growth ($71.0 million).

- The formula guarantees a minimum funding level per pupil and requires the counties to provide a local match; all counties currently appropriate amounts considerably above the required local match. The pupil count used in the current expense formula is the full time equivalent (FTE) school enrollment as of September 30th of the previous school year. Therefore, fiscal 1998 current expense aid is based on enrollment from September of 1996. The FTE count does not include prekindergarten students and, with the exception of Garrett County, includes one-half the number of students enrolled in kindergarten. The FTE computation includes evening high school students and excludes out-of-state students.

- The current expense formula is a "minimum foundation" formula. Under a minimum foundation approach local school systems are guaranteed a minimum funding level per pupil. In fiscal 1998 the minimum foundation is $3,720 per pupil. The current expense formula determines the State and local shares of the foundation for each school system. Overall the State share of the foundation in fiscal 1998 is $1,891 per pupil or a little over 50 percent of the $3,720 foundation.

- The formula recognizes the disparities in local abilities to raise revenues from local sources by providing less wealthy counties relatively more aid than more wealthy counties: the formula "equalizes" education spending (See **Exhibit 14**). Aid per student is distributed inverse to wealth per student. For example, in fiscal 1998 Worcester County, the "wealthiest" county will receive $205 per pupil, whereas Baltimore City, the "least wealthy" county will receive $2,759 per pupil. **Exhibit 15** graphically shows the relationship between wealth per student and aid per student under the formula. For purposes of the formula, wealth includes the two major local tax bases -- net taxable income and assessable base. The counties are required to fund the difference between the minimum foundation and the State share of the foundation.

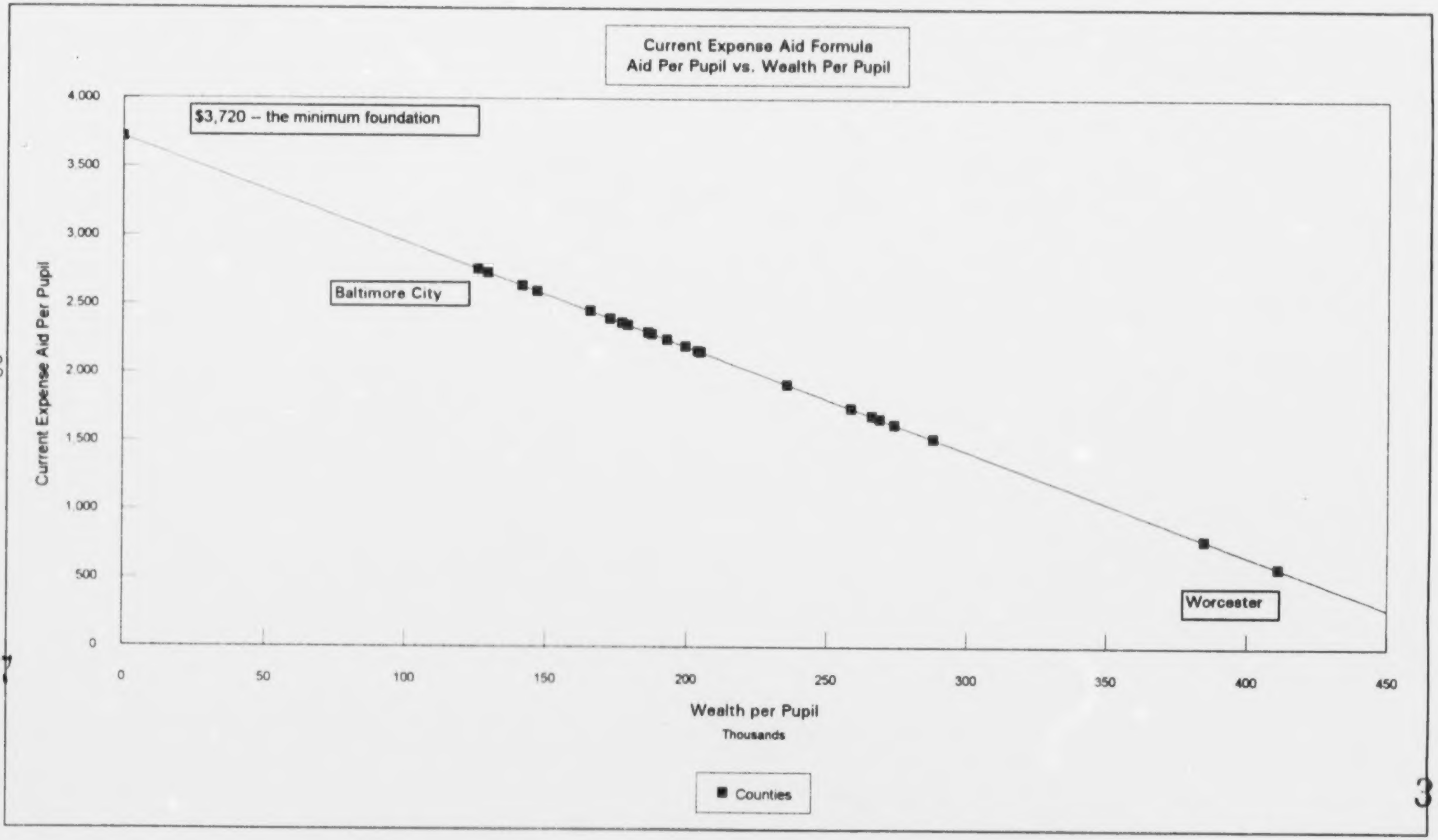
Exhibit 14

Basic Current Expense Formula Aid - FY 1998

Foundation:	**$3,720**
Local Contribution Rate:	**0.0076219**

County	FTE Enrollment 9/30/96	Basic Program $3,720 Times Enrollment	Wealth Base	Local Share $3,720 Program	State Share $3,720 Program	Per Pupil State Aid FY 1998	State Aid Prior Year $3,532 Program	Difference Over Prior Year	Per Pupil Difference
ALLEGANY	10,560.50	39,285,060	1,552,305,303	11,831,516	27,453,544	2,600	26,442,465	1,011,079	117
ANNE ARUNDEL	68,862.25	256,167,570	18,880,923,796	143,908,513	112,259,057	1,630	105,493,978	6,765,079	75
BALTIMORE CITY	99,611.00	370,552,920	12,553,401,985	95,680,775	274,872,145	2,759	262,560,397	12,311,749	147
BALTIMORE	97,092.00	361,182,240	26,123,008,102	199,106,955	162,075,285	1,669	148,463,082	13,612,203	101
CALVERT	13,407.50	49,875,900	3,163,988,400	24,115,603	25,760,297	1,921	23,128,675	2,631,622	105
CAROLINE	5,186.50	19,293,780	672,233,388	5,123,696	14,170,084	2,732	13,188,412	981,672	140
CARROLL	24,964.00	92,866,080	4,980,913,872	37,964,027	54,902,053	2,199	50,297,393	4,604,660	115
CECIL	13,984.00	52,020,480	2,503,792,257	19,083,654	32,936,826	2,355	30,742,300	2,194,526	114
CHARLES	20,069.25	74,657,610	4,093,495,950	31,200,217	43,457,393	2,165	41,454,402	2,002,991	83
DORCHESTER	4,847.75	18,033,630	837,804,873	6,385,665	11,647,965	2,403	10,989,373	658,592	111
FREDERICK	31,937.00	118,805,640	6,548,550,914	49,912,400	68,893,240	2,157	63,269,211	5,624,028	112
GARRETT	5,054.75	18,803,670	894,795,545	6,820,042	11,983,628	2,371	11,635,707	347,921	80
HARFORD	35,482.00	131,993,040	6,850,360,191	52,212,760	79,780,280	2,248	74,306,762	5,473,518	101
HOWARD	37,174.00	138,287,280	10,708,691,588	81,620,576	56,666,704	1,524	51,115,255	5,551,448	99
KENT	2,630.50	9,785,460	700,448,600	5,338,749	4,446,711	1,690	4,178,802	267,909	79
MONTGOMERY	115,219.25	428,615,610	44,369,537,790	338,180,180	90,435,430	785	84,837,036	5,598,394	35
PRINCE GEORGE'S	117,378.50	436,648,020	24,072,631,953	183,479,193	253,168,827	2,157	231,202,651	21,966,175	145
QUEEN ANNE'S	5,929.00	22,055,880	1,534,524,079	11,695,989	10,359,891	1,747	9,953,401	406,490	40
ST. MARY'S	13,281.00	49,405,320	2,490,610,196	18,983,182	30,422,138	2,291	28,149,428	2,272,710	116
SOMERSET	2,911.25	10,829,850	412,501,683	3,144,047	7,685,803	2,640	7,739,970	(54,167)	66
TALBOT	4,173.75	15,526,350	1,716,606,164	13,083,801	2,442,549	585	2,827,167	(384,618)	-97
WASHINGTON	18,742.00	69,720,240	3,489,706,814	26,598,196	43,122,044	2,301	41,530,092	1,591,951	77
WICOMICO	13,039.00	48,505,080	2,162,715,725	16,484,003	32,021,077	2,456	30,592,678	1,428,399	97
WORCESTER	6,376.00	23,718,720	2,940,567,832	22,412,714	1,306,006	205	2,661,904	(1,355,898)	-222
Total	**767,912.75**	**$2,856,635,430**	**184,254,117,000**	**1,404,366,454**	**1,452,268,976**	**1,891**	**1,356,760,542**	**95,508,434**	**94**

Exhibit 15


Current Expense Aid Formula
Aid Per Pupil vs. Wealth Per Pupil
$3,720 -- the minimum foundation
Baltimore City
Worcester
Current Expense Aid Per Pupil
4,000
3,500
3,000
2,500
2,000
1,500
1,000
500
0
0
50
100
150
200
250
300
350
400
450
Wealth per Pupil
Thousands
■ Counties

Compensatory Aid Formula ($80.9 Million and 3.4% of FY 1998 Aid)

The compensatory aid formula distributes aid to local school boards based on the number of students from economically disadvantaged environments (as measured by the student counts used for Title I aid). Increases in compensatory aid are tied to increases in the current expense formula. In fiscal 1998 compensatory aid grows $4.1 million or 5.4 percent.

- Bases aid on the student counts used for the distribution of federal Title I aid. The federal government develops the data using socio-economic data from the decennial census: the primary factor is the number of children ages 5-17 living in poverty. These Title I eligible counts are an indication of the number of students from economically disadvantaged environments.

- Recognizes local fiscal disparities by adjusting the grants per Title I student by local wealth: the less wealthy counties receive relatively more aid per Title I student.

- The overall funding level rises with growth in the per pupil minimum foundation under the current expense formula. Before adjusting for local wealth, a county's grant per Title I student equals 25 percent of the minimum foundation.

- Requires that about 25 percent of the aid be used for programs for students from economically or educationally deprived environments.

Teachers' Retirement ($445.0 Million and 18.8% of FY 1998 Aid)

The State pays 100 percent of the employers' share of retirement costs for school system employees who are members of the Teachers' Retirement and Pension Systems maintained and operated by the State. In fiscal 1998 the State share is $445 million, which consists of 18.8 percent of education aid. The $4.0 million decrease in fiscal 1998 results from a 3.0 percent increase in the salary base and a 3.8 percent decrease in the contribution rate.

- Rather than distributing the aid to the school boards and billing them for the retirement contributions, the State appropriates a lump sum payment to the retirement system "on-behalf of" the local school boards. The appropriation is based on an estimate of the prior year's salary base. Local school systems are required to pay the retirement costs associated with employees funded under federal programs. The county-by-county aid amounts shown in **Exhibit 5** are estimates based on each school board's share of the total salary base.

- Variations in the estimates of each county's aid per student reflect differences in salary levels and staffing ratios among the counties.

School Bus Transportation Grants ($106.6 Million and 4.5% of FY 1998 Aid)

The fiscal 1998 budget includes $103.6 million, reflecting a 4.9 percent increase in the transportation CPI and the additional enrollment based funding. As well, $4.0 million is provided in fiscal 1998 to the counties to aid in the additional costs of transporting handicapped students.

- Each county receives a grant for student transportation based on the county's grant in the previous year increased by the change in the Baltimore area consumer price index for private transportation. Increases can not exceed 8 percent or be less than 3 percent. Legislation enacted by the 1992 General Assembly reduced the transportation grant from $141.2 million to $86.2 million. Subsequent increases have been from this lower base.

- As a result of legislation enacted in 1996, beginning with fiscal 1998 counties with enrollment increases will receive additional funds. In fiscal 1998, the additional grants equal one-half the enrollment increase multiplied times the total transportation aid per pupil in the previous year. After fiscal 1998, the grants will be based on the entire enrollment increase rather than half the increase.

- The formula grants for transporting handicapped students recognize additional transportation costs. Each school board receives $500 per special education student in excess of the number transported in fiscal year 1981.

Special Education Grants ($142.5 Million and 6.0% of FY 1998 Aid)

State aid for special education recognizes the additional costs associated with providing programs for students with disabilities. Most special education students receive services in the public schools; however, if an appropriate program is not available in the public schools students may be placed in a private school offering more specialized services. The fiscal 1998 funding for special education includes $81.3 million based on the county-by-county formula and $61.2 million for nonpublic placements.

- $11.3 million of the $81.3 million for special education programs in the public schools is based on the number of special education students in each jurisdiction adjusted by county wealth. This portion of the grant is not mandated by statute. The Governor has provided funding on this basis in the State budget since fiscal 1988. Each county's share of the remaining $70 million equals what the county received under the original formula in fiscal 1981. The old formula based aid on total enrollment and a 1976 special education cost index.

- For special education students placed in nonpublic day and residential programs the counties are responsible for the local share of the basic costs of educating a nonhandicapped child plus 200 percent of total basic costs. Any costs above the base amount are shared between the State and the local school boards on a 80 percent State/20 percent local basis.

Limited English Proficiency Grants ($7.8 Million and 0.3% of FY 1998 Aid)

Under this program the State provides grants to support programs for non- and limited- English proficient students. The fiscal 1998 budget includes $5.9 million for the local school boards that is required by statute and an additional $1.9 million to supplement the program in accordance with the Baltimore City school legislation (SB 795) enacted at the 1997 session.

- For purposes of this program non- and limited-English proficient student means a student identified as such under the Maryland State Department of Education's Maryland School Performance reporting requirements. To be eligible for the grants county school boards must have approved programs for providing instruction and services to limited English proficient students. School boards must annually report the actual expenditures of State funds on limited English proficiency programs.

- Beginning with fiscal 1996, the statute specifies that the local school boards receive $500 for each non- and limited-English proficient student. No student may be included in the non- and limited-English proficient count for more than two years.

- The additional funds under SB 795 provide $500 per student for those students identified as non- and limited English proficient but not included in the count for formula funding because the students had already been in the count for two years. In addition, a school system with the number of limited English proficient students exceeding 5 percent of enrollment receives an additional $250,000. Only Montgomery County qualifies for this additional grant. Although the amounts in SB 795 are based on current student counts there is no provision to recalculate the grants in subsequent years.

Targeted Poverty Grants ($8.0 Million and 0.3% of FY 1998 Aid)

The State provides funds to local school systems based on the number of students who qualify for a free or reduced price lunch. Under the statute $8 million in fiscal 1998 is distributed to all school systems based on the county's proportionate share of the total number of students living in poverty.

- A county school board must submit to the State Board of Education a comprehensive plan for specific schools to improve the educational achievement of students living in poverty. Upon approval of the plan, the county school board will receive funds based on the county's proportionate share of the total number of students eligible for free/reduced lunch in the prior school year. The grants must be targeted to the specific schools and may not exceed $1,500 per students living in poverty.

- Beginning in fiscal 1996, the statute mandates that at least $8.0 be included in the State budget for this program.

Additional Poverty Grants ($18.2 Million and 0.8% of FY 1998 Aid)

The fiscal 1998 State budget includes $18.2 million in additional poverty grants distributed through two separate programs. Both are based on the number of students qualifying for free or reduced price lunch. Baltimore City does not receive funds under either program.

- The city school legislation enacted in 1997 (SB 795) includes a five year commitment to provide $16.6 million to all school systems with the exception of Baltimore City. Each school system's share of the $16.6 million is based on the school system's proportional share of the number of students qualifying for free or reduced price lunches as of October 1995. There is no provision to recalculate the amounts in subsequent years based on updated free and reduced price lunch counts.

- The fiscal 1998 State budget includes an additional $1.6 million targeted to school systems with over 40 percent of their students eligible for free/reduced lunches.

Extended Elementary Education ($14.9 Million and 0.6% of FY 1998 Aid)

The extended elementary program supports public school prekindergarten for four-year old children who live in Title I eligible school attendance areas. The fiscal 1998 budget includes a total of $14.9 million. $11.6 million will be used for the 204 existing elementary sites with an average grant of $57,000 per site. An additional $3.3 million will support another 47 sites at $70,000 per site. The additional funding is required for five years under the Baltimore City school legislation enacted in 1997 (SB 795).

- The funding supports public school prekindergarten programs for four-year old children who may be at risk of failure. The program is based on the theory that early intervention: (1) increases students' opportunity to realize their educational potential; and, (2) reduces future educational and societal costs.

- County boards of education submit proposals for sites to the Department of Education, which then determines how many sites can be funded within the appropriation in the State budget. The department distributes the money to the counties based on the schools' Title I eligibility and general need. For the additional $3.3 million committed under SB 795 each school system's share is specified in the legislation.

Maryland's Tomorrow ($10.0 Million and 0.4% of FY 1998 Aid)

- The Maryland's Tomorrow Program is designed to identify at-risk youth enrolled in public schools and provide them with individualized educational, training, and support services to prevent school dropouts. At-risk youth are defined as those who score below their grade level on the California Achievement Test in reading or math or who have been retained at least one grade. Funds for Maryland's Tomorrow are received directly by the local Private Industry Councils (PIC) based on an annual service proposal developed jointly by the local PIC and school board. The fiscal 1998 appropriation for the high school portion of Maryland's Tomorrow is $8 million.

- A related program, the Choice Middle School Program, provides dropout prevention services for middle school students. Starting with the 1994 school year, approximately 800 students have been receiving dropout prevention services through this program. Funds for the Choice Middle School Program are received by the University of Maryland, Baltimore County, which operates the program. Funding totals about $2 million in fiscal 1998.

Challenge Grants ($7.6 Million and 0.3% of FY 1998 Aid)

- Chapter 210 of the Acts of 1992 provides for the distribution of "Challenge Grants" to low performing schools for the purpose of school improvement based on Schools for Success goals. The Maryland State Department of Education releases funds to these schools only after it approves certain aspects of each school's improvement plans.

- Although there is specific legislative authorization for the program the funding level is at the discretion of the Governor and the General Assembly.

Gifted and Talented Programs ($4.4 Million and 0.2% of FY 1998 Aid)

The fiscal year 1998 State budget includes $4.4 million to augment educational services for gifted and talented students.

- Since fiscal 1994 Baltimore City has received $1.0 million for gifted and talented programs at five high schools in the city.

- Beginning with fiscal 1998 $2.0 million will be used to support gifted and talented programs in Montgomery County. The funds are committed for five years under the Baltimore City school legislation (SB 795) enacted in 1997.

Education Modernization ($3.2 Million and 0.1% of FY 1998 Aid)

The fiscal 1998 State budget includes $3.2 million for the second year of this multi-year initiative. The initiative provides schools access to on-line computer resources and capacity for data, voice, and video equipment. The funds will be used for equipment purchases, software, and staff development. Another $5.5 million is included under the school construction program to upgrade the wiring in 107 schools.

Magnet Schools ($14.1 Million and 0.6% of FY 1998 Aid)

Prince George's County will receive $14.1 million in the fiscal 1998 State budget for the county's magnet school programs. Of this amount $1.1 million is part of a five year commitment of funding incorporated in the Baltimore City school legislation (SB 795) enacted in 1997. Initiated in fiscal 1987, this aid supports the Prince George's County Magnet School Program. The Magnet School Program was approved by the U.S. District Court to provide for desegregation of the Prince

George's County Public Schools and to improve the quality of instruction for all county students.

Baltimore City Partnership ($33.5 Million and 1.4% of FY 1998 Aid)

The fiscal 1998 budget includes $30 million in funding for the Baltimore City Public Schools under the Baltimore City Partnership program. An additional $3.5 million was included in fiscal 1998 for specific purposes including, $2.0 million for the 10 Baltimore City reconstitution eligible schools identified in 1997, $600,000 for a comprehensive audit of the city school system, and $900,000 for implementing and monitoring the city school system restructuring. Legislation passed by the 1997 General Assembly (SB 795) restructures the management of the Baltimore City Public Schools contingent upon the inclusion of an additional $30 million in the fiscal 1998 State budget for the city schools. The legislation requires that the additional funding increase to $50 million for fiscal 1999 through 2002. Failure to appropriate the funds in any year abrogates the legislation and the management restructuring of the city school system.

Aging Schools ($4.4 Million and 0.2% of FY 1998 Aid)

The fiscal 1998 State budget includes $4.4 million to provide funds to local school systems for the improvements, repairs, and deferred maintenance of public school buildings exceeding 15 years of age. Each school system's share of the total funding is generally consistent with the school system's share of school building square footage constructed prior to 1960. A five year commitment of funding for this new program is incorporated in the Baltimore City school legislation (SB 795) enacted in 1997. The legislation specifies each school system's share of the $4.4 million.

Baltimore County Mentoring ($2.9 Million and 0.1% of FY 1998 Aid)

Baltimore County will receive $2.9 million in the fiscal 1998 State budget for a mentoring program providing professional development for teachers who work with at-risk students. Of this amount $2.4 million is part of a five year commitment of funding incorporated in the Baltimore school legislation (SB 795) enacted in 1997.

Education Funding Overview:
A National Comparison

May 1997

Department of Fiscal Services

Annapolis, Maryland

EDUCATION FUNDING OVERVIEW: A NATIONAL COMPARISON

Introduction

Across the nation, states utilize several approaches to fund local school districts. This report will highlight the different ways state assistance is provided to local school districts and how the aid addresses certain educational objectives. It draws heavily from *Public School Finance Programs of the United States and Canada 1993-1994*, a two volume set published by the American Education Finance Association and the Center for the Study of the States.

Education Funding Varies Across the Country

Throughout the nation, the responsibility of funding education programs is shared between state and local governments. In fiscal 1995, the nation's 15,000 school districts raised almost $267.7 billion to fund primary and secondary education programs. Nearly half of this revenue (46 percent) was provided by state governments, 47 percent by local governments, and 7 percent by the federal government. State support for education funding ranges from 8.5 percent in New Hampshire to 90 percent in Hawaii where the state government operates the local school district. In Maryland, the State share totals 39 percent.

Large State Share Does Not Translate into Greater Education Spending

A larger state share of education spending does not necessarily translate into more State dollars being spent on education programs. For example, in the seven states with the lowest total spending for education, the state share of education spending is significantly higher than the national average. This is illustrated in **Exhibit 1**. Four of those states actually provide less aid per pupil than Maryland, which ranks much lower on state share of spending. Idaho, for example, has a higher ranking in the percentage of education revenues provided by the state but, Maryland appropriates more state dollars per pupil for education. This results from the lower amount of total resources devoted to education in Idaho ($4,399) compared to Maryland ($7,162). Further, granting localities greater taxing authority provides additional revenues that could be used to fund educational programs in addition to state assistance. If counties in Maryland were not granted the authority to impose a local income tax, the amount of State support for education probably would be greater.

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Exhibit 1
State Share of Funding Compared to Revenues Per Pupil - Fiscal 1995

State	State Share of Funding	Rank	State Revenues Per Pupil	Rank	Total Revenues Per Pupil	Rank
Alabama	69.3%	3rd	$3,158	20th	$4,557	48th
Arkansas	63.6%	9th	$2,964	24th	$4,661	46th
Idaho	60.6%	12th	$2,666	32nd	$4,399	49th
Mississippi	53.6%	17th	$2,268	42nd	$4,232	51st
Oklahoma	63.6%	9th	$3,123	21st	$4,910	45th
Tennessee	50.2%	21st	$2,334	40th	$4,649	47th
Utah	55.7%	14th	$2,362	39th	$4,241	50th
Maryland	39.0%	38th	$2,793	31st	$7,162	15th
National Average	46.0%		$3,027		$6,581	

Many Factors Impact Education Costs

Student characteristics, cost differences, and local willingness to pay create variations in spending levels across the country. For example, per pupil expenditures in fiscal 1995 vary from $9,934 in Alaska to $3,626 in Utah, with the national average at $5,894. Maryland ranks 13th nationally at $6,720. Differences in expenditure levels do not necessarily indicate the existence of inequities in educational services. School districts and states serving higher need pupils, such as disabled children, pupils from low income families, or students with limited English proficiency, typically need to spend more money per pupil to provide a comparable level of service. Per pupil disparities are compounded when higher cost pupils are concentrated in a few districts. Further, the costs for teacher salaries, supplies, and school construction vary across the country, which could explain the low spending levels for many Southern and Rocky Mountain states.

School Districts Contrast Dramatically in Terms of Number and Size

The number and relative size of school districts impact both fiscal disparities and the cost of educating students. The number of school districts within states ranges from

1,052 in Texas to one in Hawaii. Maryland with 24 school districts has the fourth fewest school districts in the country, exceeding only Delaware (19), Nevada (17), and Hawaii (1). The small number of school districts in Maryland results in some of the nation's largest school districts. For example, over one-third of the school districts in Maryland have enrollment over 25,000, compared to only around one percent nationally. Further, all of Maryland's school districts are within the top 25th percentile for school district size. Therefore, while Caroline County with 5,500 students is one of the smallest school districts in the state, it is larger than over 85 percent of the school districts in the country.

Most School Districts Have Independent Taxing Authority

In most states school districts have their own taxing authority; however, in Maryland and thirteen other states a majority of school districts are financially dependent on another unit of local government. Fiscally independent school districts have broader financial and taxing authority than dependent school districts, with the main difference being that independent districts have ultimate control over their school budgets. However, many fiscally independent school districts still face some constraints due to voter approval requirements.

In fiscally dependent school districts, the local school boards must have either their budgets or tax levies approved by county or municipal governments. In most fiscally dependent districts school boards retain line-item budget authority, with the county or municipal governments having only broad fiscal control over the total budget amount or certain budget categories. **Exhibit 2** lists the states where a majority of local school districts are fiscally dependent on another unit of local government.

Exhibit 2
Fiscally Dependent School Districts

Alabama	Maryland	Rhode Island
Alaska	Massachusetts	South Carolina
California	Mississippi	Tennessee
Connecticut	New Hampshire	Virginia
Maine	North Carolina	

State Education Funding Address Many Objectives

State education aid addresses multiple objectives, such as providing resources to meet the educational needs of a district (education need), assisting less affluent school districts (ability to pay), requiring a certain level of local effort, and achieving the state's programmatic goals.

Education Need Targets Aid to Greater Demand Districts

The education need objective focuses on the demands placed upon a school district's resources to provide educational services. These demands include student enrollment, geography, concentrations of special need and at-risk students, and higher cost-of-living. Pupil count serves as a common education need variable, which can be measured in a number of ways such as average daily attendance (ADA), average daily membership (ADM), and full time equivalent enrollment (FTE). ADA is based on a school district's student attendance rate. FTE is based on a school district's total enrollment on a single day; whereas, ADM is based on a district's average total enrollment over a given time period. ADM which is used in 22 states is the most common pupil count in the nation, followed by FTE which is used in 12 states and ADA which is used in seven states. Some states (7) use teacher or instructional units as a measure of need instead of pupil units.

Many states (36) adjust the pupil or teacher/instructional units count through a weighted measure to provide a better reflection of a school district's education needs. For example, special education students may be double counted to reflect the higher costs of providing special education services. This approach eliminates the need for developing a separate categorical program to compensate for the additional costs of serving certain student populations. In addition, 8 states adjust for sparsity, 12 for small size, 18 for enrollment growth/decline, 7 for cost of living differences, and 11 for other factors; with 17 states making no adjustments to pupil counts for special education needs.

In Maryland, the pupil count is based on the number of students enrolled on September 30th of the previous school year. Unlike most states, Maryland does not use weighted measures to adjust the pupil count. Instead, the state relies on special categorical programs such as the limited English proficiency and compensatory aid programs to target funding to school districts with special needs.

Ability to Pay Provides Greater Assistance to Less Affluent Districts

The ability to pay principle relates to a school district's ability to fund educational services from local sources. It is based on the concept that greater state aid should be provided to less affluent school districts to ensure all school districts have the resources to provide an adequate level of education. In about half of the states (24), this principle is based solely on the local property tax which is the primary revenue source for local governments. School districts in Maryland and eight other states, however, use both property and income measures to determine ability to pay. School districts in fourteen states use a combination of incomes sources. Two states (North Carolina and Washington) do not use a measure of local fiscal capacity in the distribution of basic support aid.

Local Effort Ensures Minimum Level of Local Support

With local effort provisions states increase assistance to school districts that make a greater funding effort and discourage school districts from reducing local appropriations when state aid increases. Local effort requirements can be implemented in several ways including, requiring school districts to meet certain spending levels as a condition of receiving state aid or basing state aid on local education spending effort. The first approach is similar to the local maintenance of effort requirement in Maryland which requires local boards of education to appropriate local funds no less than the per pupil amount of the prior year's appropriation multiplied by the current year's enrollment. The latter approach is mostly used with a guaranteed tax base formula with state assistance increasing with greater local effort. Nearly one-half of states (26) utilize some form of local effort in their education formulas.

Programmatic Goals Serve To Achieve State Objectives

Many states establish or modify education funding formulas to achieve certain programmatic goals. These could include such goals as increased funding for districts with high concentration of limited English proficient students, high drop-out rates, or poor school performances. Many of these categorical programs are not based on local wealth. Examples of such programmatic initiatives in Maryland include drop-out prevention programs, challenge grants, gifted and talented programs, and extended elementary funding.

Objectives Influenced by Type of Funding Formula

State education assistance to local governments has two primary components: basic support aid which addresses the general educational needs of school districts, and categorical aid which addresses specific educational needs. Most basic support programs distribute aid inverse to local wealth. Some also include an effort component. In addition, special education needs can be addressed through general support programs by using a weighted pupil count. Categorical aid programs are based on education need and programmatic objectives and may not be based on the localities' ability to pay. One-half of the states (25) provide more than 75 percent of all state education aid through their basic support formula, while three states provide less than 50 percent of state funding through basic support. In Maryland, approximately 60 percent of state education aid flows through the basic support program.

Basic Support Programs

Education funding objectives are addressed by the type of basic support program a state develops. The funding approach could focus on one objective, as in the flat grant, or a combination of objectives, as in the guaranteed tax base. A discussion of the four main approaches to basic support programs is provided below. **Exhibit 3** provides a brief summary of the four types of education funding formulas and **Exhibit 4** shows the type of formula used in each state.

Exhibit 3
Summary of Education Funding Formulas

Flat Grant

- Simplest Approach
- Achieves Education Need and Programmatic Goals Objectives
- Does not Account for Locality's Ability to Pay

Foundation Program

- Provides Minimum Level of Per Pupil Funding
- Incorporates Education Need and Ability to Pay
- Enables States to Impose Local Effort Requirement
- Could Fail to Eliminate Educational Disparity Problem

Percent Equalization Programs

- Similar to Matching Grants
- Rewards High Spending Districts
- Low Ceiling Would Make Formula Similar to Foundation
- Builds in Current Spending Inequities

Guaranteed Tax Base

- Provides All Districts with Equal Wealth Base
- Factors in Local Effort
- Guaranteed Tax Base Needs to be High to Ensure All Districts Receive Aid
- Could be Used as An Add-on Program to Recognize Effort Among Low Wealth Districts

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Flat Per-pupil Grant

A simple approach to providing state assistance to local school districts is through the flat grant. The flat grant provides equal amounts of state aid per student. This approach can also meet the special education need objective by using a weighted pupil count for special populations. However, a major problem with flat grants is that they do not account for a school district's ability to raise revenues from local sources. For this reason, only two states use this approach.

Foundation Program

The most common education funding approach is the foundation program, which is used in 40 states. The foundation program provides a minimum level of funding per pupil; however unlike the flat grant, it incorporates a local wealth component that measures a school district's fiscal capacity. State aid is distributed inverse to local wealth: less wealthy school districts receive more aid per student than wealthier school districts. In addition, the foundation program provides a way to impose a local effort requirement, which has been implemented in 22 states. A school district must provide the difference between the minimum per pupil foundation and the state aid per pupil for the school district.

In developing a foundation program states determine the foundation level and the amount of the local contribution. The foundation level can be based on several criteria including revenues, expenditures, input system, or cost models. Maryland, one of the 40 states using this approach, bases its foundation on 75 percent of the average per pupil spending in the third and fourth prior years (most recent years for which actual costs are available). For example, in fiscal year 1998, the foundation is based on spending in fiscal years 1994 and 1995.

While foundation programs achieve many education funding objectives, they do not alleviate the disparities in educational spending across school districts. This results from the foundation level being set too low and no limit being placed on local spending beyond the foundation amount. This has resulted in school finance litigation in many states with foundation programs such as California, Montana, and Texas.

Percent Equalization Programs

Under the percent equalization program, a state funds a percentage of total spending up to a limit. In addition this approach utilizes a fiscal capacity measurement that targets greater state assistance to poorer school districts. For school districts spending above the limit this program is essentially a minimum foundation grant. A problem with percent equalization programs is that it builds in current spending inequities. Of the four states that use this approach, all impose a limit on the amount of education spending that the state will share in funding.

Guaranteed Tax Base

The guaranteed tax base and yield programs attempt to eliminate disparities in school funding by basing state aid on the revenues raised from a standard tax base. Generally, less wealthy school districts receive more state aid than wealthier districts; however, the guaranteed tax base also recognizes differences in local effort. This approach guarantees a school district the revenues the district would receive if its tax rate were applied to the guaranteed or standard tax base. State aid is the difference between the revenues that would be raised from the guaranteed tax base and revenues actually raised by the district from its tax base; therefore, districts making greater effort, as measured by their education tax rates, receive relatively more aid.

Per-pupil spending however could still differ among the school districts depending upon the district's education effort (property tax rate). If a school district's per-pupil tax base is smaller than the guaranteed tax base the school district receives state aid. The amount of the state aid depends upon the tax rate and local fiscal capacity. Local districts imposing a higher tax rate would receive relatively more state assistance.

When using this approach several questions have to be answered, such as what level should the guaranteed tax base be set and should the state impose a recapture provision requiring school districts with tax bases above the state guaranteed base to return the excess tax revenue to the state. If the guaranteed tax base is too high, states face enormous costs; however, if the base is below the state average, many school districts would not receive state aid. The guaranteed tax base approach is used in only two states.

Exhibit 4
Education Funding Formulas Used in Various States

Flat Grants	Foundation Programs With Local Effort	Foundation Programs Without Local Effort	Percent Equalization Programs	Guaranteed Tax Base/ Yield Programs	Full State Funding
Delaware	Alabama	Arizona	Connecticut	Indiana	Hawaii
North Carolina	Alaska	Arkansas	New York	Wisconsin	Washington
	Colorado	California	Pennsylvania		
	Florida	Idaho	Rhode Island		
	Georgia	Illinois			
	Iowa	Kansas			
	Kentucky	Louisiana			
	Maine	Montana			
	Maryland	Nebraska			
	Massachusetts	New Hampshire			
	Michigan	New Jersey			
	Minnesota	North Dakota			
	Mississippi	Oklahoma			
	Missouri	Oregon			
	Nevada	South Dakota			
	New Mexico	Vermont			
	Ohio	West Virginia			
	South Carolina				
	Tennessee				
	Texas				
	Utah				
	Virginia				
	Wyoming				

Categorical Aid Programs

Since basic support programs cannot address all the specific needs of a school system, almost all states have developed categorical programs. The size and number of such programs vary considerably. For example in Maryland, the State has over 30 separate programs ranging from $35,000 for the Smith Island Boat initiative in Somerset County to $445 million for teacher's retirement payments. Four areas funded through categorical programs by a number of states are school construction, student transportation, special education, and teacher retirement.

School Construction

Most states (37) provide some state support for capital outlay and debt service programs. Of these states, 7 fund the programs through their basic support program, while 30 states use a separate funding process. In Maryland, the state share averages 60 percent of the eligible costs of approved projects, with the local share ranging from 20 percent in the poorest counties to 50 percent in the more affluent jurisdictions. (In Baltimore City, the local share is 10 percent for the first $10 million in projects and 25 percent for costs above $10 million). In Virginia, the state does not assume any of the cost for school construction, however, loan assistance programs are available. New Hampshire devotes 16.5 percent of its state aid to school construction, representing the highest amount in the country, whereas in Maryland, it totals 4 percent.

Student Transportation

All states provide some state support for student transportation, with the amount totaling 1 percent of education aid in Michigan and Wisconsin to 15.8 percent in Maine, with Maryland at 4.2 percent. Only sixteen states fund transportation through their basic support formula, with the remainder utilizing categorical formulas. Student transportation funding in Virginia is based on two factors: land area and number of students transported. However, since transportation funding is included in the state's basic education program, the aid is adjusted for local wealth. In Maryland, student transportation is funded through a separate formula, with the amount based on the transportation aid distributed in the prior year, adjusted for inflation and student enrollment growth.

Special Education

Many states (21) fund special education through their basic support program, most often by weighting different categories of pupils or services. Special education funding ranges from 1.8 percent of total aid in West Virginia to 21 percent in Louisiana, with the amount exceeding 10 percent in 18 states. In Maryland categorical special education funding comprises approximately 6.2 percent of state aid.

Teacher Retirement

A majority of states (35) contribute directly to teacher retirement funds, with the amount totaling less than 3 percent of education aid in Virginia to 20 percent in South Carolina. In Maryland, teacher retirement payments account for around 17 percent of total state education aid. Approximately 16 states contribute to FICA. Maryland discontinued social security payments in fiscal 1993. At that time it totaled $136 million or 7 percent of total state aid.

Conclusion

Maryland's approach to education funding is similar to most other states in regards to the basic funding formula used to distribute state assistance to local school systems. As in 39 other states, Maryland uses a foundation program that provides a minimum level of per pupil funding. Further, Maryland, like most states, uses categorical programs to achieve certain objectives that are not met through the foundation program. Currently there are over 30 separate programs comprising around 40% of State education aid. Unlike most states, Maryland is one of seventeen states that does not adjust the student enrollment count for special needs. Instead, Maryland relies on separate student counts such as limited English proficiency and free and reduced priced meals counts to distribute additional aid to school districts. Also, Maryland tends to contribute a smaller share of education funding than most states. In fiscal 1995, Maryland ranked 38th in the nation in the state share of education funding. Finally, Maryland is one of 14 states where local school districts are fiscally dependent on another unit of local government.

Summary of Past Studies Concerning Elementary and Secondary Education In Maryland

Presentation to the Task Force on
Education Funding Equity, Accountability, and Partnerships

August 12, 1997

Department of Legislative Services
Office of Policy Analysis

Annapolis, Maryland

Summary of Past Studies Concerning Elementary and Secondary Education in Maryland

Overview

In the last three decades, several study groups have been convened to examine how Maryland finances public education and to determine whether all students receive a thorough and adequate education. **Exhibit 1** provides a list of past study groups that have had a focus on public primary and secondary education. These study groups have had an important impact on how Maryland distributes funding to local school districts. In fact, the State's existing basic support program (basic current expense formula) is primarily a by-product of recommendations from two study groups created in the early 1970s (Hughes Commission and the Lee Task Force). Further, the State's Public School Construction Program, which will provide local school districts with over $144 million in fiscal 1998, was recommended by the Hughes Commission. During the late 1980s, the focus shifted to school accountability and student performance. Through recommendations of the Sondheim Commission, the State established the Maryland School Performance Program, which has become a national model in monitoring school performance. During the 1990s, due to budgetary constraints at the State level, the outcomes from study groups have been more tailored, addressing specific problems such as providing additional aid to students in poverty (targeted poverty grants) or with limited English proficiency.

Several issues have reappeared in many of the study groups, including spending disparities between school districts, the impact of categorical programs, and factors leading to an adequate education. Spending disparities was addressed by almost all the study groups including the Hughes, Civiletti, and Hutchinson Commissions. Some issues, such as defining the components of an adequate education, have never been firmly resolved by the study groups.

Exhibit 1
Past Studies Concerning Education Funding

1970	Commission to Study the State's Role in Financing Public Education (Hughes Commission)
1972	Task Force on Financing Public Education (Lee Task Force)
1975	Governor's Commission on Funding the Education of Handicapped Children (Schifter Commission)
1977	Governor's Commission on the Funding of Public Education (Barnes Commission)
1979	Task Force to Study State/Local Fiscal Relationships (Scanlan Task Force)
1983	Task Force to Study the Funding of Public Education (Civiletti Commission)
1985	Task Force on the Funding of Special Education (Hebeler Commission)
1986	Governor's Commission on Teacher Salaries and Incentives (Hess Commission)
1987	Governor's Commission on School Performance (Sondheim Commission)
1993	Governor's Commission on School Funding (Hutchinson Commission)

Study Groups in the 1970s

Since 1922, Maryland has attempted to provide all children in the State with an appropriate level of education by establishing one of the nation's first funding equalization programs. During the first 40 years of operation under the concept of equalization, spending disparities between school districts never became so great as to generate any concerns regarding the equity of educational opportunities. However, beginning in the 1960s, education spending disparities began to increase thus resulting in many children being denied an equal opportunity to receive an adequate education. To address this concern, two major study groups were created in the early 1970s to examine how Maryland finances public schools.

In 1970, Governor Mandel established the Hughes Commission which concluded that the State was "not presently meeting its obligation to all of its children ... and that children are being denied equal, or even adequate, opportunity because of place of residence." Several commission findings included: (1) escalation of education expenditures; (2) shift in the burden of financing education from the State to the local level; and (3) increased spending disparities between school districts. To address these findings, the commission recommended the establishment of a new education funding formula and the reimbursement of future school construction and of the debt service costs of past construction projects. The commission's second recommendation resulted in the creation of the Maryland Public School Construction Program in 1971. Action on the commission's first recommendation was not taken until Governor Mandel appointed the Lee Task Force in 1972, which had the charge to develop a new State public education aid formula. The task force recommended establishing a new basic current expense formula that would be based on education spending in prior years. In addition, the new formula incorporated a "floating local contribution rate". This formula, known as the "Lee-Maurer formula" became effective in fiscal 1974.

In 1977, Governor Lee created the Barnes Commission to determine (1) what, if any, additional aid programs should follow the Maurer Plan; (2) the feasibility of consolidating the current expense foundation program with one or more of the State's categorical programs; (3) the level of financial support for education programs that would provide a reasonable equality of opportunity among all students without generating an undue tax burden. The commission recommended that the Lee-Maurer formula be continued but at a higher per pupil foundation and that a compensatory education program for disadvantaged pupils be substituted for the existing density aid program. In addition, the commission recommended that existing categorical programs such as school transportation, school construction, and teacher's social security and retirement costs remain in place. Two of the Barnes Commission's recommendation (increasing the foundation and establishing a compensatory education program) were implemented in fiscal 1980. In fiscal 1981, the foundation was increased again as a result of the recommendations of the Scanlan Task Force.

Task Force to Study the Funding of Public Education (Civiletti Commission)

In 1983, the Civiletti Commission was established, by Governor Hughes, to review the full range of programs of State support for public education, with a goal of providing equal education opportunity for students. The commission identified three primary concerns affecting the State's system of education funding: spending disparity, local maintenance of effort, and the high proportion of State education aid distributed through categorical aid programs.

The concern over spending disparity arose from the *Somerset et al. vs. Hornbeck* case, whereby the plaintiffs argued that the State's school funding mechanism was unconstitutional because some districts have less funding available than more affluent districts. (In that case, the State Court of Appeals upheld the State's system of financing schools.) The commission also was concerned that there was no requirement that prevented local school districts from supplanting local funds that were being used for educational purposes with State funds. The commission noted that the intent of the maintenance of effort requirement was "to insure that additional State revenues are used to increase total education expenditures and not to reduce local taxes." Finally, the commission found that "as the State has dedicated additional funds to categorical programs, there has been a consistent decline over the last decade in the percentage of State aid being distributed through the equalized general aid program". The commission concluded that this factor contributed significantly to spending disparities in the State.

The commission also believed that a definition of an "excellent fundamental education" should be developed that would indicate the specific services needed to provide equal educational opportunities to each child in the State. The commission felt that such a definition would enable the State to develop a foundation program that would assist in alleviating educational disparities. This concept would require the State to determine what educational resources (teachers, text books, computers, facilities, etc.) would be needed in every school to provide students with an adequate education.

Two major recommendations made by the commission include: (1) over a five year period, increase the per pupil foundation grant to an amount equal to 75% of the two year statewide average of per pupil expenditures for basic current expenses; and (2) consolidate the existing Density, Compensatory, and Targeted Aid Programs into a single new formula in which a per pupil amount equal to 25% of the per pupil foundation amount and distribute according to the federally determined Chapter 1 count. As a result of legislation enacted in 1984 and 1987, both of these recommendations have been fully implemented. In addition, the commission proposed a local maintenance of effort provision that would require a local government, as a condition of receiving additional State funding, to provide its school district with at least as much funding per pupil in the current fiscal year as was provided in the preceding fiscal year.

The commission also recommended that any future study of school finance issues focus on developing a definition of an "excellent fundamental education", addressing the issue of accountability, and reviewing major categorical aid programs. While the issue of accountability was addressed in 1987 by the Sondheim Commission, no subsequent study group has been able to decide what constitutes an "excellent fundamental education". In addition, no action has been taken to consolidate categorical programs into the basic support program, although it was a recommendation of the 1993 Hutchinson Commission. In fact, the use of categorical programs has increased in recent years.

Commission on Teacher Salaries and Incentives (Hess Commission)

In 1986, the Hess Commission was established to examine the relationship between teacher availability and quality and the financial and nonfinancial rewards of teaching. The commission determined that average mid-career salaries of teachers lagged behind those of comparable professions and that there was a significant teacher salary differential between counties in the State. Further, the commission found that the greatest disequalizing factor in State aid distribution was the State's payment of retirement and social security benefits. To address these concerns, the commission made several far reaching recommendations, none of which has been enacted. These recommendations are listed in **Exhibit 2**.

Exhibit 2
Recommendations of the Hess Commission

1. Eliminate State payment of teacher's retirement and social security benefits and redistribute the funds through the Current Expense Formula.
2. Establish a minimum teacher salary schedule.
3. Target additional State funds to enhance mid-career salaries in subdivisions with below average per pupil wealth.
4. Target additional funds to less wealthy school districts for enhancing local staff development programs and for providing other opportunities and incentives for teachers.
5. Develop a program of new tuition grants/loans for teacher candidates studying in public institutions of higher education in Maryland and provide competitive grants to Maryland colleges and universities to stimulate the development of non-traditional programs for teacher certification.
6. Strengthen the local maintenance of effort requirement.

Commission on School Performance (Sondheim Commission)

In 1987, Governor Schaefer appointed a commission to examine ways to measure the performance of the State's public schools and to develop strategies for improvement. The commission found that many Maryland students failed to obtain the basic skills needed to function in a technological based economy. Further, the commission determined that (1) the current assessment tests were inadequate in measuring how much of the subject matter a student knows; and (2) local school systems were not required to take any action to improve their students' performance.

Several of the commission's recommendations are listed in **Exhibit 3**. The commission based these recommendations on three fundamental premises: (1) all children can learn; (2) all children have the right to attend schools in which they can progress and learn; and (3) all children shall have a real opportunity to learn equally rigorous content. To implement these recommendations, the Maryland State Board of Education in 1989 established the Maryland School Performance Program.

Exhibit 3
Recommendations of the Sondheim Commission

1. Establish a comprehensive system of public accountability and assessment in which the school, school district, and State are held responsible for student performance.
2. Establish a statewide school improvement program and a public school accreditation program.
3. Establish a computerized management information system that is capable of tracking school and school system data.
4. Eliminate rules, regulations, and other strictures that constrain school staffs in applying their professional abilities and creativity to the task of teaching children.
5. Establish an independent, continuing oversight body to monitor standards and to review accountability procedures.

Commission on School Funding (Hutchinson Commission)

In 1993, the Hutchinson Commission was established to determine an adequate level of school funding and to devise ways to use additional funds to improve student/school performance. The commission found that the single best predictor of school results (school performance) is the percentage of students approved for free or reduced price lunch. The commission reported that "schools with high proportions of students living in or near poverty perform poorly regardless of the school system in which they are located. The commission also noted that while a school's performance can be measured through the MSPP, positive incentives designed to encourage better school results were still lacking. Further, the commission found that the allocation of some State funds through categorical programs limited the ability of school systems to determine the best use of resources to achieve better results. The commission's recommendations are listed in **Exhibit 4.**

Exhibit 4
Recommendations of the Hutchinson Commission

1. Increase current expense formula aid (the foundation grant) based on the per pupil spending in school systems that have met State performance standards and serve relatively low proportions of students living in poverty.
2. Include the costs of existing categorical funding programs into the foundation.
3. Increase and target funding for children living in or near poverty.
4. Integrate existing and additional resources and services for families and children beginning at birth and extending through secondary school to address problems that interfere with learning.
5. Provide additional funding for limited English proficiency programs and programs for highly able students.
6. Freeze the State's contribution to the Teachers' Retirement Program at the 1995 level.
7. Require school systems to utilize fully the expertise of principals, teachers, parents, and other members of school communities in assuring the success of all students.

Conclusion

The system of funding public schools in Maryland has been the subject of several study groups. Many of these study groups found that the State has failed to provide an adequate education for its children, thus leading to broad changes to the State's funding formulas (Hughes Commission); however, other study groups, such as the Barnes Commission, only recommended minor changes. School accountability and student performance became a focus in the late 1980s through the creation of the Sondheim Commission. The commission's findings resulted in the development of the Maryland School Performance Program, which has become a catalyst for improving school performance in the State. While the financial impact of study groups in the 1990s has been limited due to the State's fiscal constraints, several programs addressing specific problems such as providing additional aid to students in poverty or with limited English proficiency have been implemented. In sum, education study groups have had an important impact on the funding and operation of public schools in Maryland.

Department of Legislative Services, August 12, 1997

Summary of Baltimore City Public Schools Reform Legislation

SB 795 (Chapter 105)
New Baltimore City Board of School Commissioners

Presentation to the Task Force on
Education Funding Equity, Accountability, and Partnerships

August 12, 1997

Department of Legislative Services
Office of Policy Analysis

Annapolis, Maryland

New Baltimore City Board of School Commissioners

- Effective June 1, the Governor and Mayor must jointly appoint the nine voting members of the New Baltimore City Board of School Commissioners from a list submitted by the State Board of Education. The non-voting student member is selected by the Associated Student Congress of Baltimore City.

  Update: The members of the new board were announced by the Governor and Mayor on May 27. They include five women and four men with experience in business or education, of whom five are African-Americans and three are parents or guardians of city school students. The Governor and Mayor chose J. Tyson Tildon, Associate Dean for research and graduate studies at the University of Maryland Medical School, to be the new board's chairman.

- The Chief Executive Officer (CEO) will be responsible for overall administration of the Baltimore City Public Schools (BCPS). The CEO will be hired by the new board and the continued employment of the CEO is contingent upon a demonstrable improvement in the academic performance of students and the successful management of the BCPS.

- An interim CEO must be hired by June 15, 1997. A permanent CEO must be hired by October 30, 1997, which can be extended to no later than December 31, 1997. The interim CEO is not eligible to be the permanent CEO.

  Update: After receiving an extension, on June 26 the new board announced its choice for interim CEO -- Dr. Robert Schiller. Dr. Schiller is a respected educator known for advocating high academic standards and accountability. He was most recently Michigan Superintendent of Schools, where he managed an $8 billion annual budget and 1.6 million schoolchildren. Prior to that he was deputy superintendent in Delaware. After retiring as Michigan superintendent in 1995, Dr. Schiller became a full professor and director of undergraduate studies at Nova Southeastern University in Florida, from which he has taken a leave of absence while in Baltimore. The new board has begun its search for a permanent CEO.

- The positions of Chief Academic Officer and Chief Financial Officer will both report to the CEO and their continued employment is contingent on the demonstrable improvement in the performance of the school system.

- A Research and Evaluation Unit must perform ongoing research and evaluation of school system reforms and student achievement.

- A 14-member Parent and Community Advisory Board must be consulted by the CEO and new board to ensure parental involvement in education policy.

Department of Legislative Services, August 12, 1997

- Responsibility for all functions relating to the BCPS is assigned to the new board, including establishment of new procurement and personnel systems. The personnel system must include a performance-based system-wide personnel evaluation system for teachers, principals, and administrators.

- Baltimore City must comply with provisions of the State Education Article from which it was previously exempted.

Accountability

- The new board must adopt a Transition Plan by September 1, 1997, and a Master Plan by March 1, 1998. The Master Plan must be reviewed and approved by the State Board of Education and State Superintendent.

  Update: Dr. Schiller presented his proposal to improve academic achievement to the new board in late July. His proposal includes establishing a city-wide curriculum based on State learning goals, conducting standardized testing on students to provide baseline data and to measure progress, and extending the school day by two hours for voluntary reading, math, and science classes. Dr. Schiller also proposes hiring hundreds of new teachers or reading specialists in grades 1 to 3 to reduce class sizes and focus resources on reading instruction, at a reported cost of $20 million. The new board is holding several community meetings on the proposal and will seek expert advice before adopting a Transition Plan.

- The $30 million in additional aid in FY 1998 will be distributed in two allotments: $15 million on July 1, 1997 and the balance after the new board adopts the Transition Plan, which must include the specific purposes for which the funds will be used.

- The General Assembly must receive and consider both the Transition and Master Plans, the comments of the State Board of Education and State Superintendent regarding the plans, and progress made in achieving the goals before approving the FY 1999 State budget. The General Assembly will consider the annual reports and the comments of the State Board and the State Superintendent on the progress made in achieving goals before approving the State budget each year.

- The Master Plan must address 16 areas including: incorporation of the key recommendations of recent management study reports; reorganization of the central office of the BCPS; development of a city-wide curriculum framework reflecting State learning outcomes; and measurable outcomes and time lines for the implementation and evaluation of reforms made in accordance with the Master Plan.

- The new board must issue an annual report.

- A consultant must complete an interim review of the school system before February 1, 2000, and a final comprehensive review by December 1, 2001.

- The new board and the State Board of Education must review the findings of the final comprehensive review and conduct four public hearings throughout Baltimore City. They must report back to the General Assembly by January 15, 2002. During the 2002 regular session, the General Assembly shall deliberate and determine whether certain provisions of the act should be modified. If no further action is taken by the General Assembly, then after June 30, 2002, the act remains the same except the State Board will no longer submit a list of qualified candidates from which the new board would be appointed by the Governor and the Mayor.

Personnel Provisions

- Non-instructional, supervisory personnel in the central administration must reapply to the new board for continued employment. All tenured employees will retain their employment, but not necessarily in the same position.

- The new board must bargain collectively with the appropriate employee organizations. The new board must initially bargain with the employee organizations recognized as the bargaining representatives for any unit which includes school employees until an exclusive employee representative is selected.

- All collective bargaining agreements in effect on the effective date of the act remain in effect until the new board negotiates changes to the agreements.

- Non-certificated employees will retain their rights as civil service employees through June 30, 1998, and will retain their eligibility, seniority, and continuous service status for reemployment by the Mayor and the City Council.

- Employees of the school system will retain their sick leave, personal leave, and vacation leave and the right to convert one of every four unused sick days which have been accumulated prior to the effective date of the act into cash.

- The new board must provide employees with the same health care benefits as provided to civil service employees of the city until December 31, 1998.

Financial Provisions

- Powers, duties, equipment, assets, liabilities, etc. of BCPS are transferred to the new board. If assets are not sufficient to fund the liabilities transferred then the liabilities will be retained by the city. The liabilities for accumulated leave prior to June 30, 1997, will be shared by the new board and the city.

- The city must continue to provide services to the school system at the same rate of compensation until the new board enters into a new agreement with the city.

- The new board must expeditiously establish a new financial reporting system to track and report school system expenditures.

- A comprehensive financial audit of the school system is required upon the effective date of the act.

  Update: The new board has been developing the scope of the audit and expects to select an independent audit firm in late August.

State Funding

- State funding reflects the consent decrees for the three lawsuits pending involving BCPS and a commitment to appropriate additional funds for BCPS of $30 million in FY 1998 and $50 million in FY 1999 through FY 2002.

  In FY 1998, the $30 million may only be spent:
  1) to improve academic achievement; 2) to improve the educational performance of schools with a high percentage of students living in poverty and of reconstitution-eligible schools; 3) to begin implementation of a new performance-based evaluation system for teachers, principals, and administrators; 4) to make progress toward teacher salary parity with Baltimore County; and 5) to make other improvements that directly support classroom instruction.

- An additional $3.5 million was appropriated to BCPS in FY 1998 with the following restrictions: $2 million for the 10 reconstitution-eligible schools identified in 1997; $350,000 for developing the Transition and Master Plans; $600,000 for the comprehensive financial audit of BCPS by an independent auditor due by November 1, 1997; and $550,000 for orientation of the new board members and monitoring of the restructuring by the State Department of Education.

- An additional $31.6 million in education funds is provided for counties around the State, for each of FY 1998 - 2002. The additional funds are contingent upon the Governor providing the funds for BCPS each year, and are abrogated after June 30, 2002. The funding levels do not increase over the five-year period. Although county-by-county allocations for over half of this aid are based on formula computations, the legislation does not provide for recalculation of the grants based on changes in formula components.

Exhibit 1 shows that the additional funding includes funds for most jurisdictions in the following programs:

- $16.6 million for the New Targeted Poverty Program;
- $ 1.9 million for the Limited English Proficiency Program;
- $ 4.4 million for the Aging School Program; and
- $ 3.3 million for the Extended Elementary Education Program;

and special grants for certain jurisdictions:

- $ 2.4 million for Baltimore County's Teacher Mentoring Program;
- $ 2.0 million for Montgomery County's Gifted and Talented Program; and
- $ 1.1 million for Prince George's County's Magnet School Program.

The legislation also provides $739,500 each year for small and medium sized community colleges.

Other funds in the FY 1998 budget contingent on enactment of SB 795 included $1.6 million for targeted poverty grants for six jurisdictions and $553,000 in fire apparatus funds for Prince George's County.

- If the General Assembly fails to appropriate any of the additional education funds in any year, the act is abrogated.

- The additional BCPS funding is separate from the State funding under the current expense and compensatory aid formulas and other State aid to schools. If any new source of revenue becomes available which is dedicated to education generally, BCPS must receive its designated share of that revenue.

Exhibit 1

Additional Education Aid Provided Through Baltimore City School Reform Legislation (SB 795)

	City-State Partnership	$96 Per Pupil Targeted Pov. Grant	Additional LEP Funding	Aging School Repair Program	Additional EEEP	Special Grants*	Total
Allegany		484,128	0	150,000	35,000		669,128
Anne Arundel		1,038,816	40,500	240,000	245,000		1,564,316
Baltimore City	30,000,000		81,000	120,000	105,000		30,306,000
Baltimore		2,446,368	45,000	1,750,000	210,000	2,400,000	6,851,368
Calvert		184,032	0	25,000	0		209,032
Caroline		212,448	4,000	35,000	105,000		356,448
Carroll		215,040	11,000	180,000	0		406,040
Cecil		301,056	2,500	150,000	175,000		628,556
Charles		455,424	5,000	25,000	490,000		975,424
Dorchester		220,800	5,500	25,000	0		251,300
Frederick		445,728	2,500	35,000	175,000		658,228
Garrett		216,192	0	35,000	35,000		286,192
Harford		612,960	16,500	180,000	280,000		1,089,460
Howard		326,880	37,500	25,000	140,000		529,380
Kent		95,616	3,500	25,000	35,000		159,116
Montgomery		2,469,216	1,129,000	510,000	210,000	2,000,000	6,318,216
Prince George's		4,840,416	465,500	420,000	0	1,100,000	6,825,916
Queen Anne's		117,216	1,000	35,000	70,000		223,216
St. Mary's		361,632	6,000	35,000	140,000		542,632
Somerset		168,192	4,000	25,000	35,000		232,192
Talbot		110,016	3,000	60,000	105,000		278,016
Washington		571,200	15,000	90,000	140,000		816,200
Wicomico		443,808	19,500	150,000	490,000		1,103,308
Worcester		226,176	6,000	25,000	70,000		327,176
	30,000,000	16,563,360	1,903,500	4,350,000	3,290,000	5,500,000	61,606,860

*Special grants include $2.4 million for the Baltimore County teacher mentoring program, $2.0 for Montgomery County gifted and talented programs, and $1.1 million for the Prince George's County magnet school program.

Prepared by: Office of Policy Analysis, Department of Legislative Services
Date: August 5, 1997

Follow-Up Items

Presentation to the Task Force on
Education Funding Equity, Accountability, and Partnerships

September 17, 1997

Department of Legislative Services
Office of Policy Analysis

Annapolis, Maryland

Meeting Follow-up Items - August 12, 1997

1. Provide the median household incomes for the states listed in Exhibit 1 of the Education Funding Overview: A National Comparison.

State	Median Household Income - 1995 (Rank)	
Alabama	$25,991	(47)
Arkansas	$25,814	(49)
Idaho	$32,676	(31)
Mississippi	$26,538	(45)
Oklahoma	$26,311	(46)
Tennessee	$29,015	(42)
Utah	$36,480	(13)
Maryland	$41,041	(4)
National Average	$34,076	

Source: U.S. Bureau of the Census
State Rankings 1997

2. Reconcile the difference between the per pupil revenue ($7,162) stated in the Education Funding Overview with information provided in the Fact Book.

- The $7,162 amount included in the *Education Funding Overview* report represents the total amount of revenues received by school districts in Maryland on a per pupil basis for fiscal 1995. The amount was derived by using average daily attendance.

- The $6,446 amount in MSDE's *Fact Book* includes all educational expenditures incurred by local school systems in fiscal 1996 except for equipment expenditures and tuition payments. This amount was derived by using the per pupil belonging enrollment count which includes the average number of students enrolled in school over the course of a year.

- The use of two different enrollment counts to calculate the per pupil amounts explains the majority of the discrepancy. Since the average daily attendance enrollment count is approximately 7% lower than the cost per pupil belonging count, per pupil revenues/ expenditure figures using the ADA count will be slightly higher.

3. Reconciliation of teacher retirement expenditures for Somerset County (Exhibit 6, Structure of School Finance).

In fiscal 1998, State teachers' retirement aid for Somerset County, on a per pupil basis, was the second highest in the State and 11% above the statewide average. The above average per pupil teacher's retirement aid is attributable to several factors: (1) declining student enrollment; (2) low student-teacher ratio; and (3) a smaller percentage of teachers at the beginning end of the pay scale. Student enrollment in Somerset County has been declining for several years, therefore Somerset County has not been pressured to hire additional teachers. Consequently, Somerset County has a larger percentage of teachers at the middle and upper levels of the salary scales than the State average. Finally, due to the low student-teacher ratios, Somerset County has more teachers on payroll than the average school system, thereby contributing to higher personnel costs.

1996-1997 School Enrollment Ratios
Elementary School

County	# Schools	Students	Teachers	Teacher Student Ratio	Other Prof. Staff	Other Staff Student Ratio
Allegany	13	4,540	259.9	17.5	30.6	148.4
Anne Arundel	76	36,266	1,838.0	19.7	301.0	120.5
Baltimore City	109	52,811	2,704.1	19.5	339.9	155.4
Baltimore	101	52,866	2,960.5	17.9	528.0	100.1
Calvert	11	6,881	331.8	20.7	45.0	152.9
Caroline	5	2,800	149.6	18.7	25.0	112.0
Carroll	19	12,801	633.1	20.2	104.5	122.5
Cecil	17	7,821	430.3	18.2	62.3	125.5
Charles	19	9,757	496.4	19.7	87.7	111.3
Dorchester	5	2,160	119.3	18.1	20.5	105.4
Frederick	29	16,656	907.3	18.4	116.2	143.3
Garrett	10	2,334	167.6	13.9	18.0	129.7
Harford	31	18,943	1,043.2	18.2	162.6	116.5
Howard	33	19,003	1,121.3	16.9	157.8	120.4
Kent	4	1,272	75.1	16.9	9.0	141.3
Montgomery	124	62,556	3,362.4	18.6	533.6	117.2
Prince George's	120	68,467	3,530.2	19.4	507.7	134.9
Queen Anne's	6	3,117	170.5	18.3	22.9	136.1
St. Mary's	16	7,085	400.5	17.7	62.4	113.5
Somerset	5	1,560	85.9	18.2	11.8	132.2
Talbot	6	2,293	116.2	19.7	14.6	157.1
Washington	25	9,712	546.2	17.8	86.8	111.9
Wicomico	14	7,682	435.9	17.6	44.8	171.5
Worcester	5	2,864	153.0	18.7	22.0	130.2
Total	803	412,247	22,038.3	18.7	3,314.7	124.4

Source: MSDE Grade Organization Maryland Public Schools - September 30, 1996
Prepared by: Office of Policy Analysis - September, 1997.

1996-1997 School Enrollment Ratios
Middle Schools

County	# Schools	Students	Teachers	Teacher Student Ratio	Other Prof. Staff	Other Staff Student Ratio
Allegany	3	1,915	120.2	15.9	13.0	147.3
Anne Arundel	18	16,075	832.3	19.3	132.1	121.7
Baltimore City	26	19,049	1,165.2	16.3	169.0	112.7
Baltimore	29	23,555	1,550.6	15.2	193.1	122.0
Calvert	4	3,315	164.7	20.1	20.0	165.8
Caroline	4	1,291	70.0	18.4	11.0	117.4
Carroll	7	6,030	342.3	17.6	39.7	151.9
Cecil	6	3,259	183.9	17.7	24.0	135.8
Charles	7	5,044	261.7	19.3	41.4	121.8
Dorchester	2	1,146	59.9	19.1	11.0	104.2
Frederick	11	7,793	481.6	16.2	56.6	137.7
Garrett	2	1,135	77.0	14.7	9.0	126.1
Harford	9	8,677	539.9	16.1	75.4	115.1
Howard	15	9,059	625.1	14.5	81.6	111.0
Kent	0	0	0.0		0.0	
Montgomery	30	25,867	1,598.8	16.2	221.2	116.9
Prince George's	25	17,943	1,098.2	16.3	154.7	116.0
Queen Anne's	2	965	54.7	17.6	7.7	125.3
St. Mary's	4	3,220	208.7	15.4	23.3	138.2
Somerset	2	691	52.0	13.3	7.4	93.4
Talbot	1	823	50.5	16.3	8.0	102.9
Washington	6	3,832	235.5	16.3	29.0	132.1
Wicomico	2	1,735	119.6	14.5	12.6	137.7
Worcester	1	933	52.4	17.8	5.5	169.6
Total	216	163,352	9,944.8	16.4	1,346.3	121.3

Source: MSDE Grade Organization Maryland Public Schools - September 30, 1996
Prepared by: Office of Policy Analysis - September, 1997.

1996-1997 School Enrollment Ratios
Secondary Schools

County	# Schools	Students	Teachers	Teacher Student Ratio	Other Prof. Staff	Other Staff Student Ratio
Allegany	4	3,082	184.9	16.7	18.2	169.3
Anne Arundel	12	19,399	1,020.7	19.0	130.6	148.5
Baltimore City	17	18,598	1,108.8	16.8	145.7	127.6
Baltimore	26	27,306	1,732.5	15.8	231.9	117.7
Calvert	3	3,867	181.3	21.3	22.0	175.8
Caroline	1	961	47.6	20.2	8.0	120.1
Carroll	5	7,246	379.0	19.1	49.2	147.3
Cecil	5	3,817	224.4	17.0	32.7	116.7
Charles	5	6,346	349.6	18.2	51.7	122.7
Dorchester	2	1,410	86.3	16.3	10.5	134.3
Frederick	9	9,138	515.5	17.7	64.2	142.3
Garrett	2	1,508	107.4	14.0	12.0	125.7
Harford	11	9,953	610.8	16.3	74.9	132.9
Howard	10	10,714	630.8	17.0	94.5	113.4
Kent	1	720	47.0	15.3	26.5	27.2
Montgomery	21	33,090	1,870.5	17.7	251.9	131.4
Prince George's	22	34,658	1,940.5	17.9	264.4	131.1
Queen Anne's	1	1,636	100.0	16.4	10.8	151.5
St. Mary's	3	3,991	199.9	20.0	25.4	157.1
Somerset	2	921	63.8	14.4	9.4	98.0
Talbot	2	1,329	85.2	15.6	15.0	88.6
Washington	7	5,104	306.0	16.7	38.0	134.3
Wicomico	3	3,391	208.9	16.2	21.6	157.0
Worcester	3	1,817	108.3	16.8	17.1	106.3
Total	177	210,002	12,109.7	17.3	1,626.2	129.1

Source: MSDE Grade Organization Maryland Public Schools - September 30, 1996
Prepared by: Office of Policy Analysis - September, 1997.

1996-1997 School Enrollment Ratios
Other Schools

County	# Schools	Students	Teachers	Teacher Student Ratio	Other Prof. Staff	Other Staff Student Ratio
Allegany	5	1,653	127.3	13.0	28.2	58.6
Anne Arundel	5	582	87.9	6.6	13.1	44.4
Baltimore City	28	18,301	1,115.6	16.4	141.2	129.6
Baltimore	3	346	71.3	4.9	31.8	10.9
Calvert	1	89	13.5	6.6	1.0	89.0
Caroline	1	537	33.0	16.3	5.0	107.4
Carroll	2	154	20.9	7.4	13.5	11.4
Cecil	0					
Charles	1	12	5.0	2.4	1.0	12.0
Dorchester	3	534	23.9	22.3	4.5	118.7
Frederick	1	162	21.8	7.4	5.1	31.8
Garrett	3	184	15.0	12.3	3.0	61.3
Harford	1	136	45.3	3.0	12.3	11.1
Howard	1	81	25.5	3.2	3.0	27.0
Kent	3	906	57.0	15.9	9.5	95.4
Montgomery	7	992	145.3	6.8	21.0	47.2
Prince George's	12	4,130	321.5	12.8	65.6	63.0
Queen Anne's	1	646	40.0	16.2	6.0	107.7
St. Mary's	1	22	2.0	11.0	0.0	
Somerset	1	25	0.0		1.0	25.0
Talbot	0					
Washington	6	1,248	117.4	10.6	22.3	56.0
Wicomico	2	1,092	73.3	14.9	8.2	133.2
Worcester	3	1,150	84.0	13.7	11.0	104.5
Total	91	32,982	2,446.5	13.5	407.3	81.0

Source: MSDE Grade Organization Maryland Public Schools - September 30, 1996
Prepared by: Office of Policy Analysis - September, 1997.

1996-1997 School Enrollment Ratios
LEA Totals

County	# Schools	Students	Teachers	Teacher Student Ratio	Other Prof. Staff	Other Staff Student Ratio
Allegany	25	11,190	692.3	16.2	90.0	124.3
Anne Arundel	111	72,322	3,778.9	19.1	576.8	125.4
Baltimore City	180	108,759	6,093.7	17.8	795.8	136.7
Baltimore	159	104,073	6,314.9	16.5	984.8	105.7
Calvert	19	14,152	691.3	20.5	88.0	160.8
Caroline	11	5,589	300.2	18.6	49.0	114.1
Carroll	33	26,231	1,375.3	19.1	206.9	126.8
Cecil	28	14,897	838.6	17.8	119.0	125.2
Charles	32	21,159	1,112.7	19.0	181.8	116.4
Dorchester	12	5,250	289.4	18.1	46.5	112.9
Frederick	50	33,749	1,926.2	17.5	242.1	139.4
Garrett	17	5,161	367.0	14.1	42.0	122.9
Harford	52	37,709	2,239.2	16.8	325.2	116.0
Howard	59	38,857	2,402.7	16.2	336.9	115.3
Kent	8	2,898	179.1	16.2	45.0	64.4
Montgomery	182	122,505	6,977.0	17.6	1027.7	119.2
Prince George's	179	125,198	6,890.4	18.2	992.4	126.2
Queen Anne's	10	6,364	365.2	17.4	47.4	134.3
St. Mary's	24	14,318	811.1	17.7	111.1	128.9
Somerset	10	3,197	201.7	15.9	29.6	108.0
Talbot	9	4,445	251.9	17.6	37.6	118.2
Washington	44	19,896	1,205.1	16.5	176.1	113.0
Wicomico	21	13,900	837.7	16.6	87.2	159.4
Worcester	12	6,764	397.7	17.0	55.6	121.7
Total	1,287	818,583	46,539.3	17.0	6,694.5	121.7

Source: MSDE Grade Organization Maryland Public Schools - September 30, 1996
Prepared by: Office of Policy Analysis - September, 1997.

1996-1997 School Enrollment Ratios
BY Type of School

County	Elementary Teacher Student Ratio	Middle Teacher Student Ratio	High School Teacher Student Ratio	Other Schools Teacher Student Ratio
Allegany	17.5	15.9	16.7	13.0
Anne Arundel	19.7	19.3	19.0	6.6
Baltimore City	19.5	16.3	16.8	16.4
Baltimore	17.9	15.2	15.8	4.9
Calvert	20.7	20.1	21.3	6.6
Caroline	18.7	18.4	20.2	16.3
Carroll	20.2	17.6	19.1	7.4
Cecil	18.2	17.7	17.0	N/A
Charles	19.7	19.3	18.2	2.4
Dorchester	18.1	19.1	16.3	22.3
Frederick	18.4	16.2	17.7	7.4
Garrett	13.9	14.7	14.0	12.3
Harford	18.2	16.1	16.3	3.0
Howard	16.9	14.5	17.0	3.2
Kent	16.9	N/A	15.3	15.9
Montgomery	18.6	16.2	17.7	6.8
Prince George's	19.4	16.3	17.9	12.8
Queen Anne's	18.3	17.6	16.4	16.2
St. Mary's	17.7	15.4	20.0	11.0
Somerset	18.2	13.3	14.4	N/A
Talbot	19.7	16.3	15.6	N/A
Washington	17.8	16.3	16.7	10.6
Wicomico	17.6	14.5	16.2	14.9
Worcester	18.7	17.8	16.8	13.7
Total	18.7	16.4	17.3	13.5

Source: MSDE Grade Organization Maryland Public Schools - September 30, 1996
Prepared by: Office of Policy Analysis - September, 1997.

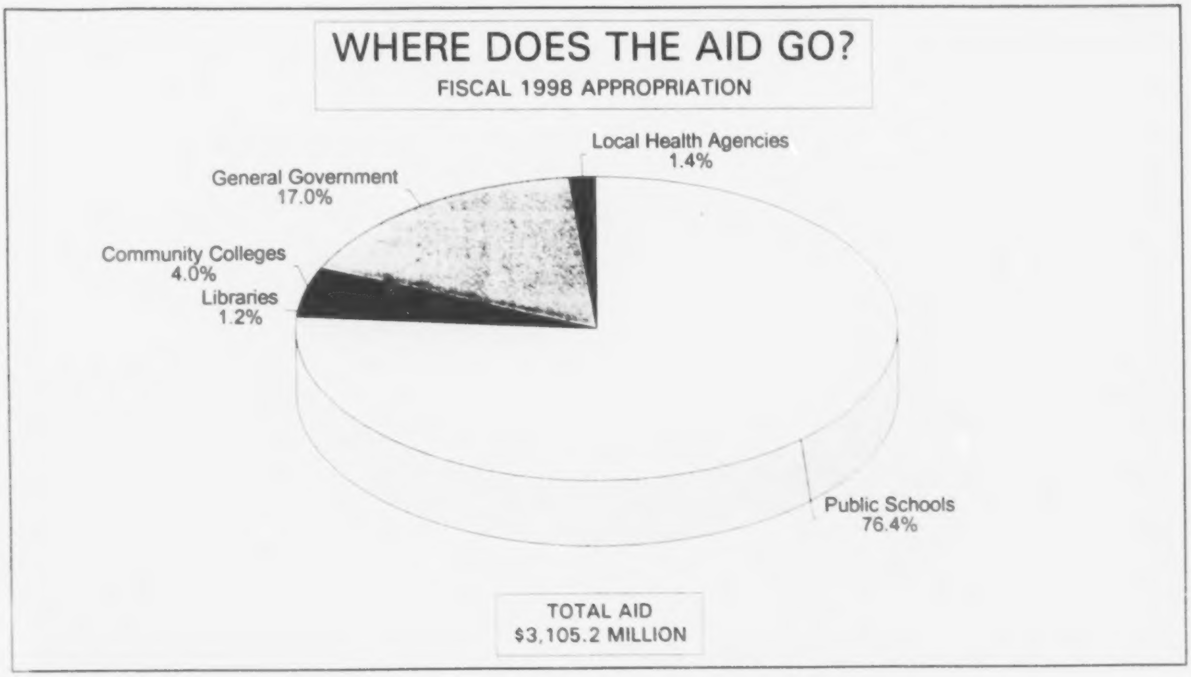
Overview of State Aid and Trends in the 1990s

Presentation to the Task Force on
Education Funding Equity, Accountability, and Partnerships

September 17, 1997

Department of Legislative Services
Office of Policy Analysis

Annapolis, Maryland



WHERE DOES THE AID GO?

FISCAL 1998 APPROPRIATION

TOTAL AID $3,105.2 MILLION

State Aid to Local Governments By Governmental Entity

($ in millions)

	Actual FY 1990	% of Total	Actual FY 1994	% of Total	Approp. FY 1998	% of Total
General Government	$540.2	24.2	$433.6	17.6	$527.6	17.0
Public Schools	1,498.3	67.0	1,867.3	75.6	2,372.5	76.4
Community Colleges	117.8	5.3	109.2	4.4	125.6	4.0
Libraries	31.9	1.4	29.0	1.2	37.0	1.2
Local Health	47.8	2.1	30.0	1.2	42.5	1.4
Total	$2,236.1	100.0	$2,469.1	100.0	$3,105.2	100.0

Notes:

1) General government includes grants to county and municipal governments, primarily for transportation and public safety.

2) Public schools, libraries, and community colleges include state paid teachers' retirement costs.

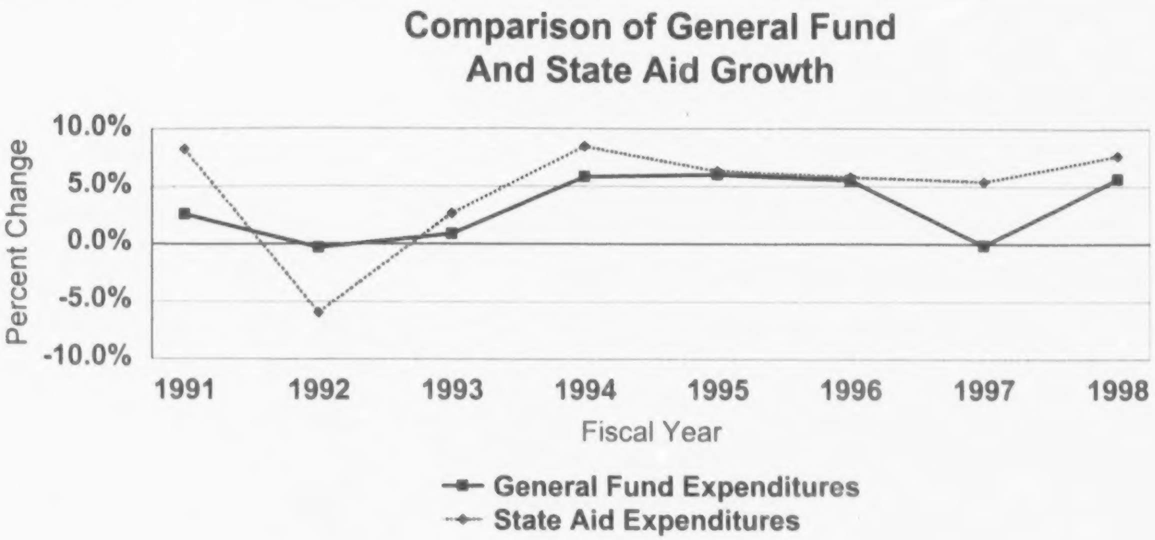
Prepared by: Office of Policy Analysis, Department of Legislative Services
Date: September 15, 1997

State Aid Expenditures Related to Total State Expenditures FY 1990 - FY 1998

($ in millions)

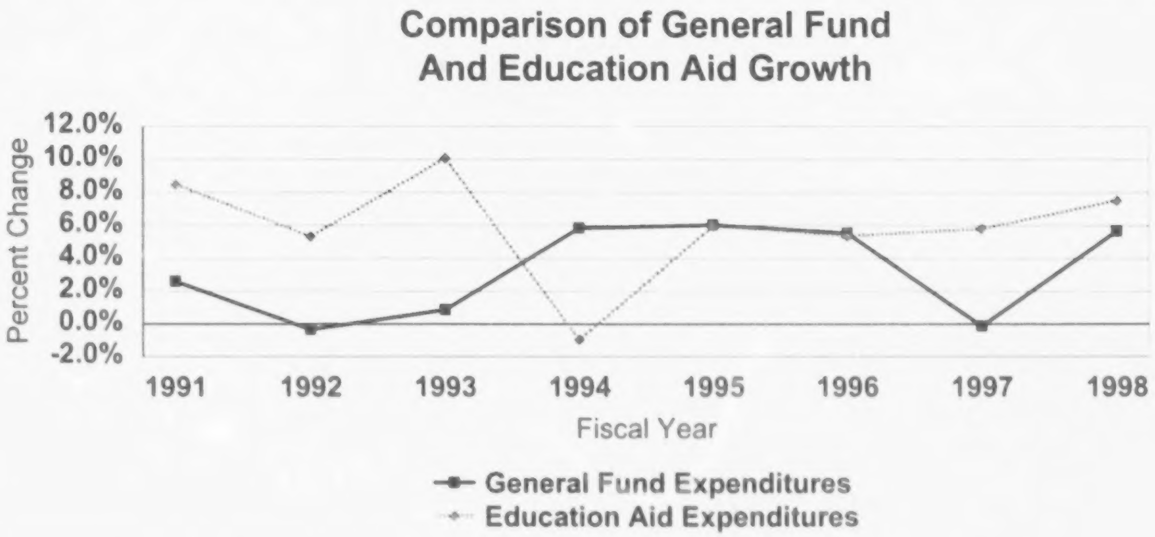
Fiscal Year	Expenditures All State Funds	State Aid General & Spec. Funds	Percent of Total	Expenditures General Funds	State Aid General Funds	Percent of Total
1990	9,165.4	2,236.1	24.4	6,046.3	1,871.1	30.9
1991	9,311.1	2,314.7	24.9	6,203.8	2,025.8	32.7
1992	9,160.5	2,191.6	23.9	6,183.4	1,905.6	30.8
1993	9,281.0	2,252.9	24.3	6,237.8	1,956.5	31.4
1994	9,896.7	2,469.1	24.9	6,602.0	2,122.7	32.2
1995	10,673.6	2,640.1	24.7	7,000.1	2,257.3	32.2
1996	11,238.9	2,782.8	24.8	7,387.4	2,388.0	32.3
1997	11,630.8	2,912.8	25.0	7,377.4	2,517.6	34.1
1998	11,997.0	3,105.2	25.9	7,796.1	2,711.1	34.8
Ave. Annual Change	3.4%	4.2%		3.2%	4.7%	

Prepared by: Office of Policy Analysis, Department of Legislative Services
Date: September 1997



Comparison of General Fund And State Aid Growth

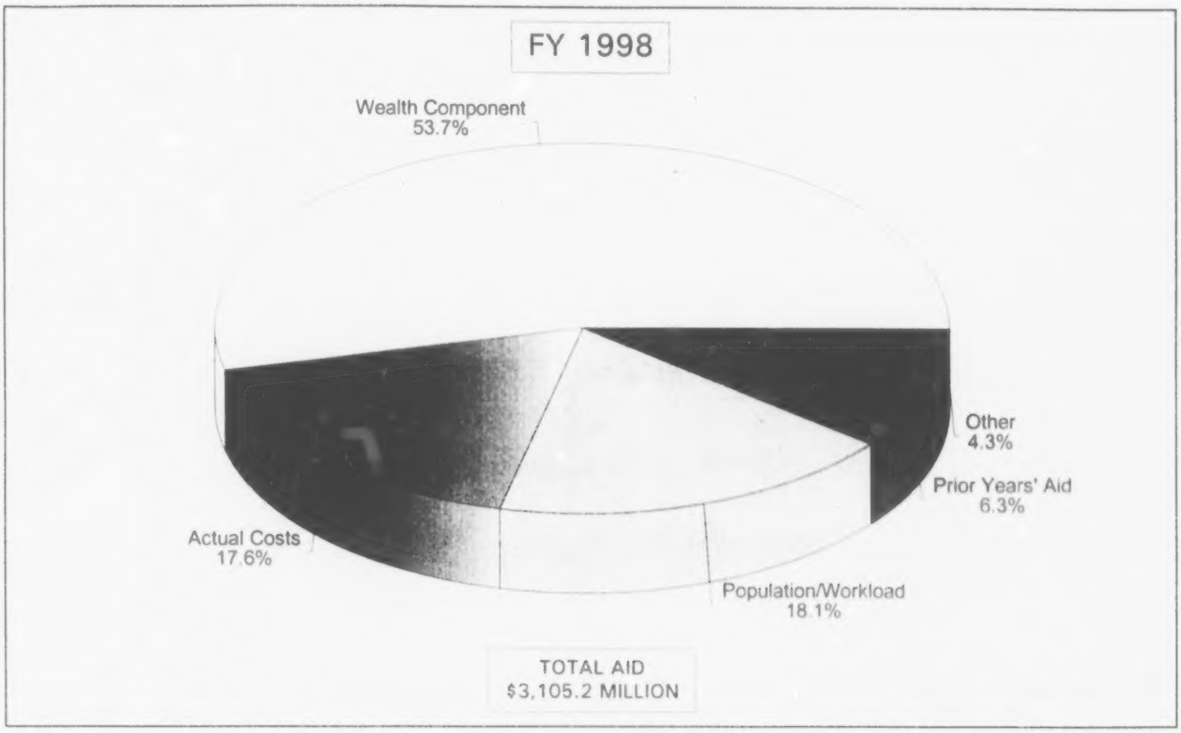
Prepared by: Office of Policy Analysis
Date: September 1997



Comparison of General Fund And Education Aid Growth

Prepared by: Office of Policy Analysis
Date: September 1997

State Aid By Basis for Distribution



Trends
(millions of dollars)

	Actual FY 1990	% of Total	Actual FY 1994	% of Total	Approp. FY 1998	% of Total
Wealth/Workload	$861.6	38.5	$1,316.8	53.3	$1,668.8	53.7
Actual Costs	501.7	22.4	433.1	17.5	546.7	17.6
Population/Workload	500.2	22.4	474.3	19.2	560.5	18.1
Origin of Revenues	109.7	4.9	0.0	0.0	0.0	0.0
Prior Years' Aid	217.4	9.7	173.3	7.0	195.9	6.3
Other	45.6	2.0	71.6	2.9	133.3	4.3
Total	$2,236.1	100.0	$2,469.1	100.0	$3,105.2	100.0

Prepared by: Office of Policy Analysis, Department of Legislative Services
Date: September 14, 1997

Changes in Aid Patterns and Impact of Early 1990's Reductions

The reductions in state aid in the early 1990's, many of which were made permanent in fiscal 1993, resulted in the restructuring of state aid. Although total aid continued to grow, albeit at a slower pace than if the reductions had not occurred, the composition of that aid changed. The changes in aid are summarized below.

- In fiscal 1998 over 76 percent of state aid goes to the public schools. In fiscal 1990 the schools accounted for 67 percent of aid. Most of this shift occurred between fiscal 1990 and 1994.
- County and municipal governments, libraries, community colleges, and local health departments will receive a smaller share of aid in fiscal 1998 than in fiscal 1990.
- Programs that distribute funds inversely to local wealth account for about 54 percent of fiscal 1998 state aid. (Most of these programs also base aid on a workload measure, such as school enrollment or population.) In fiscal 1990 wealth based programs accounted for only 39 percent of aid.
- Aid shifts resulted from significant increases in current expense formula aid (education) and major changes in other aid during the state's fiscal crisis.
- Two policy goals guided the aid changes or restructuring: (1) continue the state's commitment to the public schools; and (2) minimize the impact of reductions on jurisdictions with less ability to raise revenues from local sources.
- Increases in education aid were offset by elimination of nine programs distributing aid to county and municipal governments.

Programs Eliminated

	Amount (millions)
Property tax grant	$106.9
Beer and liquor tax revenues shared	8.2
Tobacco tax revenues shared	12.4
Financial institutions franchise tax shared	9.0
Abandoned property revenues shared	6.8
Transportation revenues shared	22.8
Corporate filing fees shared	1.8
Security interest fees shared	1.2
	$169.1

- The two significant changes in education aid did not involve programs with a wealth component. (The social security elimination also impacted community colleges -- $7.6 million and libraries -- $4.5 million.)

	Amount (millions)
Elimination of state payment of teachers' social security	$134.8
Reduction in school bus transportation grants	55.0
	$189.8

- At the same time that bus grants were reduced (fiscal 1993) and social security payments were eliminated (fiscal 1994) state current expense formula aid increased $173 million in fiscal 1993 and $88 million in fiscal 1994.

- The impact of aid reductions on counties with low taxable wealth was minimized by the funding increases in education programs distributing aid inverse to wealth and by establishing a new disparity grant targeting aid to low income jurisdictions.

Summary of State Assistance to Local Governments
FY 1991 - FY 1998
(in thousands of dollars)

Counties	FY 1991 Actual	FY 1998 Appropriation	Difference	% Difference FY 91-FY 98
Allegany	41,362	56,646	15,284	37.0
Anne Arundel	191,009	226,684	35,675	18.7
Baltimore City	522,653	715,215	192,562	36.8
Baltimore County	254,074	338,802	84,728	33.3
Calvert	26,143	42,238	16,095	61.6
Caroline	17,574	26,906	9,332	53.1
Carroll	65,770	92,219	26,449	40.2
Cecil	42,442	56,514	14,072	33.2
Charles	58,663	76,457	17,794	30.3
Dorchester	18,285	24,585	6,300	34.5
Frederick	78,951	115,047	36,096	45.7
Garrett	21,111	28,044	6,933	32.8
Harford	93,172	133,170	39,998	42.9
Howard	78,566	112,895	34,329	43.7
Kent	9,468	11,129	1,661	17.5
Montgomery	245,781	291,518	45,737	18.6
Prince George's	344,024	470,689	126,665	36.8
Queen Anne's	17,291	21,740	4,449	25.7
St. Mary's	39,307	52,736	13,429	34.2
Somerset	13,551	18,852	5,301	39.1
Talbot	10,884	10,989	105	1.0
Washington	58,937	78,569	19,632	33.3
Wicomico	40,584	56,666	16,082	39.6
Worcester	12,984	14,236	1,252	9.6
Unallocated	12,070	32,705	20,635	171.0
Statewide	2,314,656	3,105,249	790,593	34.2

Local Costs Recently Assumed by the State
FY 1991 - FY 1998
(in thousands of dollars)

	FY 1991	FY 1998	Difference
Baltimore City			
Com. College[1]	16,441	17,959	1,518
Baltimore City Jail[2]	0	64,148	64,148
WMATA			
Montgomery	0	15,296	15,296
Prince George's	0	14,030	14,030

Notes:

1) In FY 1991, the state assumed responsibility for the city's community college and the city no longer received state aid for the community college ($10.8 million in FY 1990). Amounts shown represent total state spending for the community college.

2) In FY 1992, the state assumed responsibility for the Baltimore City Jail and the city no longer received aid under the police aid formula ($37.7 million in FY 1991). The amounts also include additional state costs for the state-run Baltimore City central booking facility.

Prepared by: Office of Policy Analysis, Department of Legislative Services
Date: September 14, 1997

Overview on Education Equity, Local Wealth, and Tax Effort

Presentation to the Task Force on
Education Funding Equity, Accountability, and Partnerships

September 17, 1997

Department of Legislative Services
Office of Policy Analysis

Annapolis, Maryland

Overview on Education Equity, Local Wealth, and Tax Effort

Introduction

- Define education equity and discuss ways to measure equity;
- Discuss how Maryland's funding programs address education equity;
- Show how education equity relates to pupil performance; and
- Determine the education effort for each jurisdiction.

Education Equity

- Education equity implies that the level and quality of educational services and programs provided to students are generally uniform throughout the State and that a student's place of residence will not affect the student's ability to receive an equal educational opportunity.

Components of Education Equity

- Education equity consists of two main components: fiscal and program equity.
- **Fiscal equity** encompasses a locality's ability to generate revenue for educational purposes. Measurements relating to fiscal equity include per pupil expenditures and local wealth per pupil.
- **Program equity** involves the uniformity of educational opportunity throughout the state. Program equity can be measured by the type and quality of instructional courses offered to students, the quality of faculty members, and the level of support programs targeted to students and faculty.

Measuring Fiscal Equity

Spending Disparities Exist in Maryland

- One method of measuring fiscal equity is to determine whether spending differences exist between school districts.

- As shown in **Exhibit 1**, per pupil education spending in Maryland in fiscal 1996 ranged from $5,448 in Caroline County to $7,977 in Montgomery County. Montgomery County spends approximately 46% more per pupil than Caroline County.

- Statewide per pupil education spending averaged $6,530. Only five counties (Baltimore, Howard, Kent, Montgomery, and Somerset) were above the state average.

Exhibit 1
Education Expenditures Per Pupil - FY 1996

		% of State Average			% of State Average
Allegany	$ 5,936	90.9%	Harford	$ 5,875	90.0%
Anne Arundel	6,464	99.0%	Howard	7,162	109.7%
Baltimore City	6,208	95.1%	Kent	6,926	106.1%
Baltimore	6,594	101.0%	Montgomery	7,977	122.1%
Calvert	6,056	92.7%	Prince George's	6,287	96.3%
Caroline	5,448	83.4%	Queen Anne's	6,178	94.6%
Carroll	6,094	93.3%	St. Mary's	5,989	91.7%
Cecil	5,819	89.1%	Somerset	6,773	103.7%
Charles	6,076	93.0%	Talbot	6,309	96.6%
Dorchester	6,111	93.6%	Washington	5,801	88.8%
Frederick	5,970	91.4%	Wicomico	5,641	86.4%
Garrett	5,850	89.6%	Worcester	6,487	99.3%
Statewide	6,530	100.0%			

Many Factors Impact Education Spending

- Fiscal Capacities - counties have different abilities to raise revenue from local sources.

- Local Effort - other priorities may compete for funding and taxpayer support for education may differ among Maryland's counties.

- Cost Differentials - the costs for teacher salaries, supplies, and school construction vary across school districts.

- Special Student Populations - school districts serving higher need students, such as disabled children, pupils from low income families, or students with limited English proficiency, typically need to spend more money per pupil to provide comparable educational opportunities. Per pupil disparities are compounded when higher cost pupils are concentrated in a few districts.

- State and Federal Aid - state and federal distributions per student to local school boards vary considerably. For example, federal aid to local school districts in fiscal 1996 ranged from $96 per pupil in Howard County to $595 per pupil in Somerset County.

- Given these factors, especially the impact of cost differentials and special student populations, spending per pupil figures can provide at best a rough measure of differences in educational opportunities.

Local Wealth Varies Considerably Across State

- Another aspect of fiscal equity is whether local wealth affects the amount of funding a jurisdiction provides for education. If education spending is significantly affected by a jurisdiction's ability to raise revenue then education fiscal equity is not being achieved.

- On average, local school systems receive 56% of their revenues from local sources, with State aid accounting for 40% of local school revenue.

- Since such a large share of school revenue comes from local sources, the need for a strong local tax base is critical to funding school programs.

- Localities with a large tax base can generate more revenue to fund local school programs than less affluent jurisdictions. The varying capabilities of raising local revenues are illustrated through focusing on local wealth per pupil and property tax equivalents.

- In fiscal 1996, local wealth per pupil ranged from $117,949 in Caroline County to $416,235 in Worcester County. **Exhibit 2** shows the per pupil local wealth and per pupil spending in each county. The exhibit indicates that a positive relationship exists between per pupil spending and local wealth.

- A one cent increase in the property tax rate in Montgomery County generates an additional $3 million in revenues, whereas it generates only $836,000 in Baltimore City, even though both jurisdictions have nearly the same number of residents. **Exhibit 3** shows the fiscal impact of a one cent increase in local property tax rates for fiscal 1997.

Exhibit 2

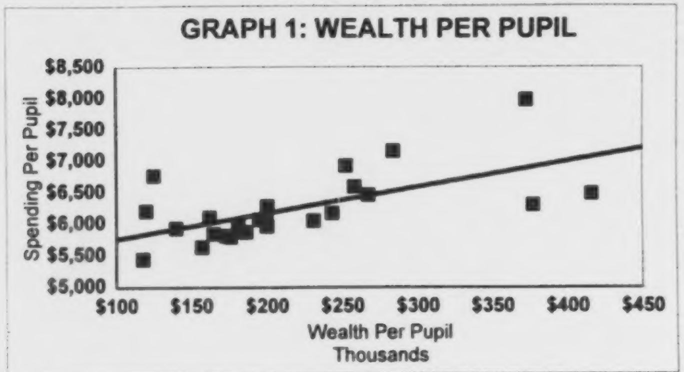
COMPARISON OF PER PUPIL EDUCATION SPENDING WITH SELECTED STATISTICS

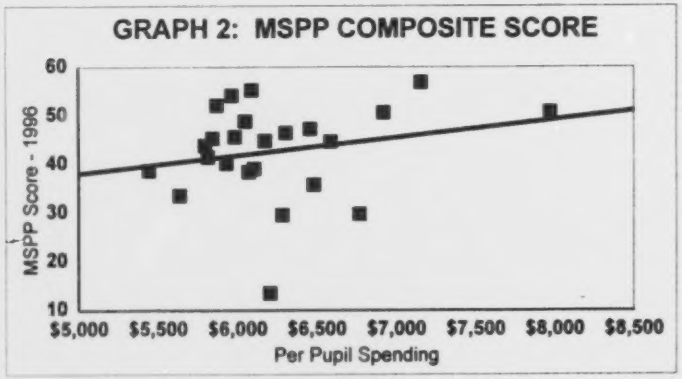
FY 1996

County	Per Pupil Spending	Wealth Per Pupil	MSPP Score	% FARM Students
Allegany	$5,936	$139,812	40.2	44.6%
Anne Arundel	6,464	267,215	47.3	15.2%
Baltimore City	6,208	120,068	13.5	70.1%
Baltimore	6,594	258,224	44.7	25.1%
Calvert	6,056	231,066	48.9	14.2%
Caroline	5,448	117,949	38.7	40.1%
Carroll	6,094	199,667	55.3	8.8%
Cecil	5,819	173,123	41.5	21.4%
Charles	6,076	195,094	38.5	22.6%
Dorchester	6,111	162,296	39.1	44.1%
Frederick	5,970	200,082	54.2	14.2%
Garrett	5,850	164,940	45.4	43.4%
Harford	5,875	186,261	52.2	17.3%
Howard	7,162	283,909	56.9	9.1%
Kent	6,926	252,512	50.7	34.8%
Montgomery	7,977	372,475	50.8	21.4%
Prince George's	6,287	200,358	29.6	41.2%
Queen Anne's	6,178	243,518	44.9	19.5%
St. Mary's	5,989	181,184	45.7	27.0%
Somerset	6,773	125,168	29.8	53.5%
Talbot	6,309	377,106	46.5	25.9%
Washington	5,801	176,224	43.9	30.0%
Wicomico	5,641	157,159	33.6	33.5%
Worcester	6,487	416,235	35.8	35.5%
MARYLAND	$6,530	$230,859	40.7	31.0%

SOURCE: Maryland School Performance Program Report, 1996, Maryland Department of Education; Department of Legislative Services

PREPARED BY: Department of Legislative Services, September 1997


GRAPH 1: WEALTH PER PUPIL


GRAPH 2: MSPP COMPOSITE SCORE

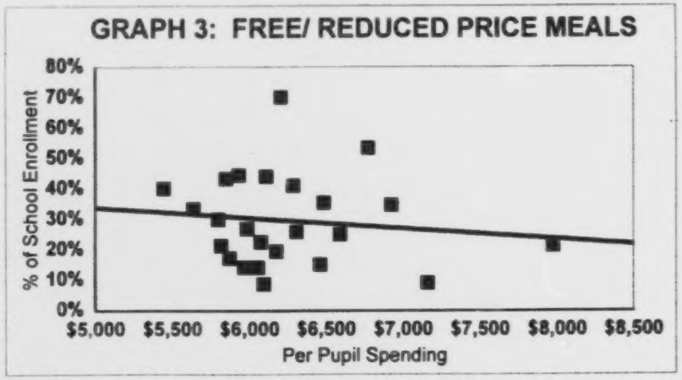

GRAPH 3: FREE/ REDUCED PRICE MEALS

Exhibit 3
One Cent Yield in Local Property Tax Rates

	Yield	Per Capita		Yield	Per Capita
Allegany	$ 117,477	$1.58	Harford	$ 454,963	$2.18
Anne Arundel	1,332,116	$2.90	Howard	708,879	$3.25
Baltimore City	836,473	$1.21	Kent	51,680	$2.76
Baltimore	1,696,018	$2.38	Montgomery	3,031,613	$3.74
Calvert	271,076	$4.24	Prince George's	1,689,928	$2.19
Caroline	46,249	$1.59	Queen Anne's	108,027	$2.89
Carroll	332,628	$2.40	St. Mary's	175,659	$2.17
Cecil	173,965	$2.22	Somerset	30,048	$1.23
Charles	299,569	$2.69	Talbot	123,698	$3.79
Dorchester	64,483	$2.12	Washington	241,435	$1.90
Frederick	434,149	$2.48	Wicomico	154,264	$1.94
Garrett	73,610	$2.49	Worcester	236,956	$5.96

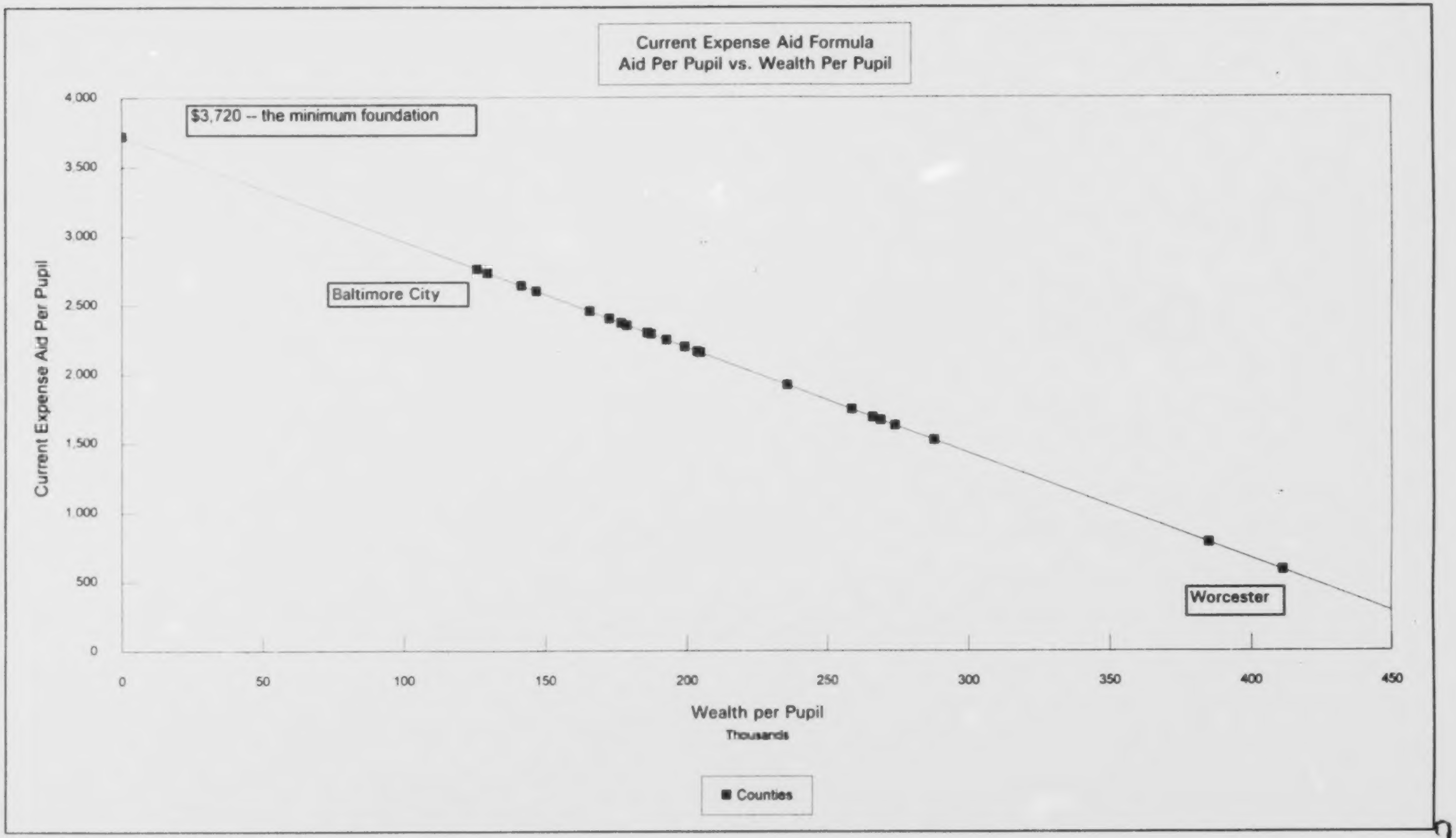
Impact of Maryland's Funding Programs on Education Equity

- State education aid to local school districts has two primary components: basic support aid which addresses the general education needs of school districts, and categorical aid which addresses specific needs.

Basic Support Program

- The current expense formula is Maryland's basic support program, accounting for about 61 percent of the State's education aid in fiscal 1998.
- The formula recognizes the disparities in local abilities to raise revenues from local sources by providing less wealthy counties relatively more aid than more wealthy counties. **Exhibit 4** shows the relationship between local wealth and state current expense aid. As illustrated, per pupil state aid increases as the relative wealth of a jurisdiction decreases.

Exhibit 4


Current Expense Aid Formula
Aid Per Pupil vs. Wealth Per Pupil
$3,720 -- the minimum foundation
Baltimore City
Worcester
Current Expense Aid Per Pupil
4,000
3,500
3,000
2,500
2,000
1,500
1,000
500
0
0
50
100
150
200
250
300
350
400
450
Wealth per Pupil
Thousands
■ Counties

Categorical Programs

- Maryland has over 30 separate categorical programs ranging from $35,000 for the Smith Island Boat initiative in Somerset County to $445 million for teacher's retirement payments.

- The use of smaller categorical programs to address specific needs of a school system have increased from 3.3 percent of State education aid in fiscal 1991 to 6.1 percent in fiscal 1998.

- Some categorical programs such as compensatory aid and special education grants incorporate a local wealth factor to distribute aid. The rationale for adjusting categorical aid by local wealth is that the amount of resources available for special needs students, as in the case of general students, varies considerably across the state.

- However, other categorical programs such as poverty grants, student transportation aid, limited English proficiency grants, and teachers' retirement payments do not use a local wealth measure to distribute aid.

Total State Education Aid

- In sum, approximately 65% of State education aid in fiscal 1998 is distributed inversely to local wealth, whereby less wealthy jurisdictions receive relatively more aid. Programs utilizing a wealth measure include the current expense formula, compensatory aid, and special education. The percentage of State education aid distributed inversely to local wealth has increased in recent years. In fiscal 1991, around 53% of State education aid was distributed inversely to wealth.

- Two factors account for this shift: 1) annual growth in current expense and compensatory aid programs has exceeded other programs; and 2) cost containment actions in 1992 included a significant reduction in student transportation grants and the elimination of State funding of teachers social security costs.

- **Exhibit 5** shows that State aid does reduce spending disparities between school districts.

Exhibit 5

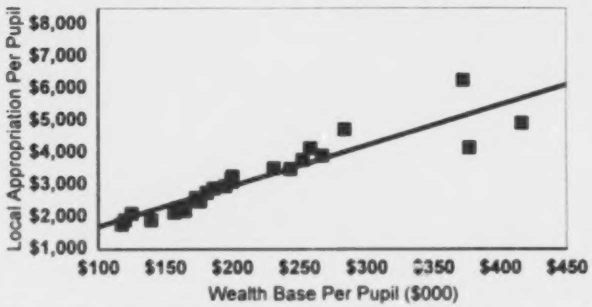
Impact of State Aid on Local Education Fiscal Resources

FY 1996

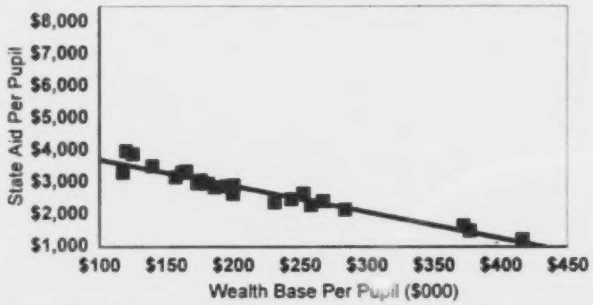
County	Wealth Per Pupil	(on a per pupil basis) Local Appr.	State Aid	All Revenue
Allegany	$139,812	$1,903	$3,510	$5,946
Anne Arundel	267,215	3,910	2,422	6,627
Baltimore City	120,068	1,905	3,991	5,529
Baltimore	258,224	4,138	2,303	6,678
Calvert	231,066	3,512	2,383	6,141
Caroline	117,949	1,771	3,309	5,458
Carroll	199,667	3,189	2,781	6,169
Cecil	173,123	2,595	2,981	5,826
Charles	195,094	2,958	2,890	6,163
Dorchester	162,296	2,274	3,312	6,193
Frederick	200,082	3,101	2,644	6,034
Garrett	164,940	2,193	3,359	6,004
Harford	186,261	2,892	2,852	5,966
Howard	283,909	4,725	2,160	7,161
Kent	252,512	3,775	2,657	6,909
Montgomery	372,475	6,263	1,653	8,156
Prince George's	200,358	3,255	2,914	6,507
Queen Anne's	243,518	3,495	2,485	6,264
St. Mary's	181,184	2,752	2,971	6,098
Somerset	125,168	2,105	3,894	6,790
Talbot	377,106	4,155	1,495	6,312
Washington	176,224	2,496	3,072	5,904
Wicomico	157,159	2,139	3,171	5,637
Worcester	416,235	4,923	1,228	6,495
MARYLAND	$230,859	$3,647	$2,694	$6,679

PREPARED BY: Department of Legislative Services, September 1997

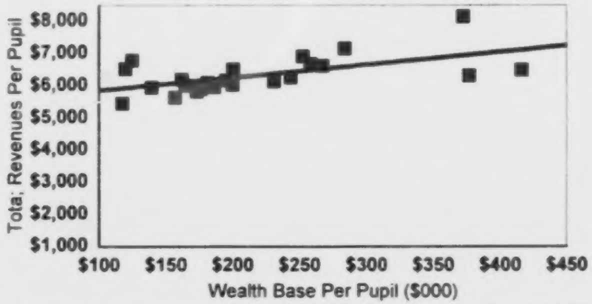
GRAPH 1: LOCAL APPROPRIATION



GRAPH 2: STATE AID



GRAPH 3: TOTAL REVENUE



Categorical Aid Programs and Fiscal Equity

- Categorical aid programs may or may not address fiscal equity. This can be illustrated by comparing two categorical programs: targeted poverty grants and compensatory aid.

- While the goal of the two programs is the same (providing additional State aid for disadvantaged students), one program, compensatory aid, also address local fiscal disparities. The other program, targeted poverty, does not.

Targeted Poverty Grants

- A majority of the state's targeted poverty grants are distributed on the basis of the number of students qualifying for free and reduced price meals. The fiscal 1998 state budget includes $26.2 million in targeted poverty grants, of which $18.2 million is new money added during the 1997 legislative session as part of the Baltimore City School legislation. Of the $26.2 million, $8 million is distributed to all school systems based on the county's proportionate share of the total number of children qualifying for free or reduced price meals; $16.6 million is distributed in the same manner to all school systems, except Baltimore City; and $1.6 million is targeted to school systems with over 40 percent of their students eligible for free/reduced price meals, excluding Baltimore City.

- The targeted poverty aid enables school districts to provide extra services in order for disadvantaged students to overcome potential barriers for educational attainment. However, this approach fails to account for different local abilities to fund programs for disadvantaged students.

- **Exhibit 6** shows that local wealth per at-risk student ranges from over $3 million in Howard County to $163,174 in Baltimore City. This indicates that Howard County's local wealth base per "at-risk" student is 18 times larger than that of Baltimore City. Statewide, the average local wealth per "at-risk" student totals approximately $713,200. Theoretically, Howard County is in a better financial position to provide comprehensive programs for its at-risk students than Baltimore City and other school districts with below average wealth bases.

Exhibit 6
School Districts with Highest Local Wealth Per FARM Student*

County	Wealth Per FARM Student	FARM Students as % of Enrollment	Poverty Grants - FY 1998	Per Pupil Poverty Grants
Howard	$3,015,000	9.1% (23rd)	$450,000	$132
Carroll	$2,118,900	8.8% (24th)	$293,000	$131
Anne Arundel	$1,683,200	15.2% (20th)	$1,397,000	$129
Montgomery	$1,661,800	21.4% (17th)	$3,328,000	$129
Calvert	$1,548,200	14.2% (21st)	$249,000	$130

School Districts with Lowest Local Wealth Per FARM Student*

County	Wealth Per FARM Student	FARM Students as % of Enrollment	Poverty Grants - FY 1998	Per Pupil Poverty Grants
Somerset	$223,400	53.5% (2nd)	$270,000	$154
Caroline	$293,500	40.1% (7th)	$340,000	$154
Allegany	$301,100	44.6% (3rd)	$781,000	$154
Dorchester	$351,300	44.1% (4th)	$357,000	$154

** FARM Student means students qualifying for free and reduced priced meals. Baltimore City is not included because the City does not receive funding under two of the targeted poverty programs.*

- An equitable aid formula does not necessarily imply that each student, or in the case of poverty grants, that each at-risk child, should receive the same level of State aid. Instead, the State may want to focus on whether an aid program alleviates or reduces spending disparities that exist between low spending school systems that serve a high concentration of at-risk students and high spending systems (even those with a high concentration of at-risk students).

Compensatory Aid Program Addresses Goal of Fiscal Equity

- The compensatory aid formula distributes aid to local school districts based on the number of students from economically disadvantaged environments (as measured by the student count used for Title I aid).

- The compensatory aid formula recognizes local fiscal disparities by adjusting the grants per Title I student by local wealth: the less wealthy counties receive relatively more aid per Title I student.

- The program requires that about 25 percent of the aid be used for programs for students from economically or educationally deprived environments.

- Per pupil compensatory aid totals $399 per student in Montgomery County and $1,218 per student in Baltimore City.

Exhibit 7
Compensatory Aid for Selected Counties

County	Compensatory Aid	Per Pupil* Aid	County	Compensatory Aid	Per Pupil* Aid
Howard	$641,600	$533	Baltimore City	$48,097,500	$1,218
Carroll	$660,100	$769	Somerset	$610,000	$1,083
Anne Arundel	$2,214,900	$560	Caroline	$754,500	$1,184
Montgomery	$2,415,800	$399	Allegany	$2,819,800	$1,044
Calvert	$446,900	$650	Dorchester	$801,200	$888

* Based on Title I enrollment.

Summary Remarks

- An important component of fiscal equity is the relative ability of local governments to raise revenue for schools from their own tax bases. Basing aid only on the number of disadvantaged students does not address the different revenue raising abilities that exists in the State.

- Therefore, providing each disadvantaged student with the same amount of State aid may not be equitable if local school systems are able to supplement the State aid with additional local resources.

Measuring Program Equity

- Measuring program equity is more difficult than measuring fiscal equity because it requires an analysis of the inputs of education spending. In determining program equity, it is important to note that equity is not achieved solely because all school districts provide the same programs. Instead, equity is achieved when the quality of the programs is generally comparable across school systems

- As stated in the Department of Legislative Services presentation on Student and School Accountability, the Maryland State Department of Education collects various amounts of data. Some of this information could be useful in determining the quality of educational programs across the state.

- The following are several factors that could be examined to determine whether program equity is being achieved in Maryland.

1. **College entry courses**. Does each school provide students the same types of classes to prepare them for college? Do some students enter college more prepared than others and was this a result of classes or programs provided by the school system?

2. **Remediation courses.** Does every child needing additional help receive it? Is the likelihood that disadvantaged children will overcome their obstacles and improve their performance affected by the school district they attend?

3. **Facilities.** Does every child attend school facilities that are conducive for learning?

4. **Teacher Quality.** Does the quality of the teacher staff vary across the State? Do some school districts have an easier time attracting and retaining quality teachers? Is there a system in place to determine the attributes of a qualified teacher? How does the State ensure that all children are taught by a qualified teacher?

Education Equity and Pupil Performance

- Fiscal equity relates to the resources devoted to public education and the differences in these resources across school systems. A key goal of State aid is to "equalize" education resources across school districts. Achieving fiscal equity, however, does not insure that all school districts will meet student performance goals.

- In Maryland, the Department of Education has developed the Maryland School Performance Assessment Program (MSPAP) to gauge statewide student performance in different subject areas.

- As the graph in **Exhibit 2** shows, there is not a clear relationship between MSPAP composite scores and school district spending. The relationship is more complex and impacted by such factors as the quality and management of educational programs and the number of students with special needs.

- The Governor's Commission on School Funding, for example, found that the single best predictor of school performance was the percentage of students approved for free or reduced price lunch. The commission reported that "schools with high proportions of students living in or near poverty perform poorly regardless of the school system in which they are located."

Education Effort Provides Measure of Local School Spending

- Local education effort measures the extent to which a local government utilizes its revenue base to fund education programs. Specifically, local effort is calculated by dividing local education appropriation by wealth, which for education purposes in Maryland includes assessable base and net taxable income, and indexing the results to the state average. **Exhibit 8** shows the education effort index for all jurisdictions and **Exhibit 9** shows both education and tax effort.

- Several factors affecting education effort include: the relative wealth of a jurisdiction, the demand for education services, special needs of a school district, and competing demands for other government services.

Factors Affecting Education Effort

Relative Wealth of a Jurisdiction

- Less wealthy counties must levy higher tax rates to raise the same amount of revenue for public services as wealthier counties. For example, even if Caroline County had the highest education effort in the state, it would still have one of the lowest spending levels.

- On the other hand, wealthier counties can raise considerable revenues for education with a relatively low education effort. For example, while Worcester County had the second lowest education effort in the state in fiscal 1994, it had the fourth highest spending level. If Worcester County's education effort equaled the state average, it would total approximately $8,000 in fiscal 1994, the highest in the state and considerably higher than spending per student in neighboring counties.

Exhibit 8

Education Effort Index
FY 1994

County	1994 County Assessable Base (in thousands)	1993 Net Taxable Income (in thousands)	Total Wealth Base (in thousands)	FY 94 Local Education Appropriation (in thousands)	Education Effort	Effort Index
Allegany	$1,188,740	$535,888	$1,724,628	$19,250	0.0112	0.77
Anne Arundel	12,160,628	5,793,199	17,953,827	238,107	0.0133	0.92
Baltimore City	8,455,680	4,664,945	13,120,625	190,191	0.0145	1.00
Baltimore	15,716,618	9,339,775	25,056,393	366,443	0.0146	1.01
Calvert	2,288,069	750,099	3,038,168	39,504	0.0130	0.90
Caroline	417,933	209,467	627,400	8,912	0.0142	0.98
Carroll	2,862,147	1,598,889	4,461,036	64,560	0.0145	1.00
Cecil	1,520,381	733,465	2,253,846	32,165	0.0143	0.98
Charles	2,548,842	1,189,990	3,738,832	54,068	0.0145	1.00
Dorchester	597,547	226,196	823,743	9,832	0.0119	0.82
Frederick	3,784,885	1,991,398	5,776,283	84,043	0.0145	1.00
Garrett	666,194	187,791	853,985	10,432	0.0122	0.84
Harford	3,784,721	2,325,517	6,110,238	87,500	0.0143	0.99
Howard	6,270,231	3,479,142	9,749,373	151,842	0.0156	1.07
Kent	467,429	173,823	641,252	9,033	0.0141	0.97
Montgomery	29,483,670	13,793,018	43,276,688	666,176	0.0154	1.06
Prince George's	15,766,295	7,784,978	23,551,273	349,164	0.0148	1.02
Queen Anne's	962,074	377,504	1,339,578	18,530	0.0138	0.95
St. Mary's	1,537,470	713,370	2,250,840	32,329	0.0144	0.99
Somerset	267,876	119,813	387,689	5,539	0.0143	0.99
Talbot	1,178,942	389,311	1,568,253	16,807	0.0107	0.74
Washington	2,069,667	1,085,899	3,155,566	43,223	0.0137	0.95
Wicomico	1,389,734	706,024	2,095,758	27,313	0.0130	0.90
Worcester	2,247,755	384,057	2,631,812	28,708	0.0109	0.75
Total	$117,633,528	$58,553,558	$176,187,086	$2,553,673	0.0145	1.00

Prepared by the Department of Legislative Services

Exhibit 9

Local Wealth and Education Effort
FY 1994

	Education Effort	Tax Effort
Allegany	0.77	0.98
Anne Arundel	0.92	0.84
Baltimore City	1.00	1.62
Baltimore	1.01	0.96
Calvert	0.90	0.68
Caroline	0.98	0.81
Carroll	1.00	0.78
Cecil	0.98	0.82
Charles	1.00	0.86
Dorchester	0.82	0.87
Frederick	1.00	0.84
Garrett	0.84	0.71
Harford	0.99	0.88
Howard	1.07	0.88
Kent	0.97	0.78
Montgomery	1.06	0.98
Prince George`s	1.02	1.26
Queen Anne's	0.95	0.74
St. Mary's	0.99	0.78
Somerset	0.99	0.91
Talbot	0.74	0.49
Washington	0.95	0.88
Wicomico	0.90	0.86
Worcester	0.75	0.74
State Average	1.00	1.00

Prepared by the Department of Legislative Services

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Demand for Education Services

- Citizen demand for education services can also increase a county's education effort. A county that is willing to spend additional funds for an expansive school program may have to utilize its revenue base to a greater extent than other counties.

School District's Special Needs

- School districts with a high concentration of special needs students or higher costs of living have to spend more money per pupil to provide a comparable level of services. Unless the school district has a relatively large tax base, the district would have to make a greater effort to fund educational programs.

Competing Demands for Other Government Services

- Other spending priorities impact the resources a county can allocate to education. As shown in **Exhibit 10,** expenditures for primary and secondary education in fiscal 1995 accounted for over 44% of spending from own source revenues. The percentages ranged from 61 percent in Talbot and Worcester counties to 24 percent in Baltimore City. Twenty-two counties allocated at least 40 percent of revenues to education. Only Prince George's and Baltimore City allocated less than 40 percent of revenues to education.

- Baltimore City allocated a sizeable share of revenue for public safety, 34.1% compared to the statewide average of 16.6%.

- Prince George's County has devoted a considerable amount of local funding for its parks and recreation system. In fiscal 1995, Prince George's County spent approximately \$87.8 million on recreation and natural resources programs or \$115 per citizen compared to \$24.2 million or \$34 per citizen spent in Baltimore County.

- Own source revenues includes locally raised revenue such as property taxes, local income taxes, transfer and recordation taxes, admissions and amusement taxes, local sales taxes, and service charges.

Exhibit 10

COUNTY SPENDING FROM OWN-SOURCE REVENUES (EXCLUDES ENTERPRISE FUNDS)
AS A % OF TOTAL
FY 1995 ADOPTED BUDGETS

	General Gov't	Public Safety	Public Works	Health & Human Services	Board of Education	Community Colleges	Recreation & Natural Resources	Debt Service	Other	Reserves	Total
Allegany	8.2%	9.7%	8.1%	4.0%	44.5%	7.8%	0.8%	10.4%	6.6% #	0.0%	100.0%
Anne Arundel	8.1%	19.1%	5.3%	3.7%	50.2%	2.3%	1.6%	6.0%	3.1%	0.5%	100.0%
Baltimore City	10.2%	34.1%	6.0%	1.3%	23.9%	0.0%	4.9%	7.3%	12.1% #	0.1%	100.0%
Baltimore	6.1%	16.2%	3.7%	2.0%	47.4%	3.6%	1.8%	8.3%	10.5% #	0.3%	100.0%
Calvert	7.4%	10.9%	2.5%	3.8%	49.1%	0.8%	3.6%	7.3%	14.6% #	0.0%	100.0%
Caroline	10.2%	12.8%	0.3%	2.7%	49.9%	2.6%	2.0%	7.6%	12.0% #	0.0%	100.0%
Carroll	11.8%	7.4%	0.6%	3.2%	53.4%	1.8%	2.0%	8.1%	10.6% #	1.2%	100.0%
Cecil	8.5%	13.2%	3.8%	2.8%	54.0%	6.2%	1.0%	7.1%	2.9%	0.5%	100.0%
Charles	10.0%	18.7%	1.5%	2.7%	52.6%	4.2%	1.3%	6.6%	1.9%	0.5%	100.0%
Dorchester	8.1%	12.1%	15.8%	2.1%	40.9%	2.5%	1.9%	7.3%	9.4% #	0.0%	100.0%
Frederick	8.6%	9.8%	0.8%	5.1%	53.0%	3.1%	1.9%	5.1%	12.0%	0.6%	100.0%
Garrett	8.4%	5.3%	24.4%	1.4%	49.8%	5.5%	-0.7%	0.1%	5.8% #	0.0%	100.0%
Harford	11.9%	11.4%	8.3%	2.1%	49.7%	3.6%	1.7%	4.2%	7.0%	0.2%	100.0%
Howard	9.2%	13.8%	2.8%	2.5%	48.4%	2.7%	5.1%	11.4%	3.1%	1.1%	100.0%
Kent	8.9%	12.3%	3.3%	2.9%	55.7%	1.8%	3.8%	1.3%	10.1% #	0.0%	100.0%
Montgomery	6.1%	12.0%	1.8%	4.3%	47.4%	2.3%	5.7%	9.2%	7.7% #	3.5%	100.0%
Prince George's (1) (a)	8.6%	15.8%	2.1%	2.5%	39.9%	1.2%	7.3%	7.7%	11.0% #	3.9%	100.0%
Queen Anne's	7.6%	12.0%	7.8%	3.7%	52.2%	1.8%	4.2%	4.8%	5.7%	0.2%	100.0%
St. Mary's	10.7%	14.5%	0.9%	2.8%	51.8%	1.3%	2.3%	8.4%	7.1% #	0.2%	100.0%
Somerset	13.8%	10.4%	14.3%	2.8%	44.9%	0.8%	3.7%	1.6%	7.6% #	0.0%	100.0%
Talbot	5.3%	8.6%	1.2%	3.8%	60.6%	2.1%	6.1%	3.1%	7.0% #	2.1%	100.0%
Washington	8.2%	9.2%	0.1%	3.6%	55.0%	4.3%	1.9%	8.8%	9.0% #	0.0%	100.0%
Wicomico	5.7%	15.2%	1.5%	3.4%	48.0%	2.0%	2.7%	11.9%	7.2% #	2.4%	100.0%
Worcester	6.2%	9.7%	3.3%	3.6%	60.7%	0.9%	1.7%	3.0%	10.9% #	0.0%	100.0%
Total	**8.0%**	**16.6%**	**3.4%**	**3.0%**	**44.4%**	**2.2%**	**4.2%**	**7.9%**	**8.6%**	**1.7%**	**100.0%**

(a) - For comparability purposes, the county's stormwater management enterprise fund was included.

- indicates these counties lump-sum their fringe benefit costs. These costs are shown in the "other" category. Fringe benefit costs for the Garrett County Roads Board are included under "public works"; all other fringe benefit costs for non-roads board employees are included in the "other" category.

"Other" includes county appropriations to a library board, urban development and housing, economic development, economic opportunity, transfers to capital and enterprise funds, and miscellaneous expenditures.

Notes:

(1) The M-NCPPC accounts for approximately 52% of the county's reserves.
(2) Service charges and other revenues, and an equivalent amount of expenditures, related to sewer and water operations, solid waste operations, parking garage operations, and transit services that are accounted for in a general fund or special revenue fund were excluded from the figures.

Source: County Budgets

Prepared by the Department of Fiscal Services, August 15, 1995

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Maintenance of Effort Issues

- In Maryland general maintenance of local effort relates to total local appropriations for school operating expenses. In order for school boards to receive increases in state current expense and compensatory formula aid, counties must appropriate at least the same dollars per pupil as in the previous fiscal year.

- Maintenance of effort relating to the total local appropriation is fairly easy to measure. As a result of recent legislation there can be exclusions for nonrecurring costs; however, the appropriation is not tied to spending for specific purposes. It also is a mandate on the county governing body, not the school board.

- When maintenance of effort relates to a specific categorical aid program, measurement is more complex. To insure that state or federal aid for a particular purpose supplements and not supplants total spending for that purpose it is necessary to track all spending for the specific purpose of the grant.

- With most state categorical aid there is the requirement that local school boards report that the funds were spent for the purpose of the grant. Examples of aid programs with this requirement include school bus transportation, dedicated compensatory aid formula funds, limited English proficiency grants, and targeted poverty grants.

- Requiring school boards to report that state aid was expended for a specific purpose, however, is different than requiring school boards to show that the state aid was not used to supplant local funding.

- Whether there should be a no supplantation provision included with categorical funding is an important policy issue. It depends on whether the purpose of the state aid is to assist the local school board with special needs, potentially freeing up funds for other purposes or whether the purpose of the aid is solely to increase total spending for a specific purpose. If the latter goal applies, then local supplantation could result in little or no additional spending for the specific program or purpose.

Prepared by: Department of Legislative Services, September 1997
Presentation to the Task Force on Education Funding Equity, Accountability, & Partnerships

Targeted Improvement Program

A Comprehensive Statewide Students At-Risk Funding Proposal

NANCY S. GRASMICK
State Superintendent of Schools

MARYLAND STATE DEPARTMENT OF EDUCATION
200 West Baltimore Street ❖ Baltimore MD 21201

School Year 1997
Local Education Agencies
Official Number of Students Approved For Free and Reduced Price Meals
October 31, 1996

Local Unit	Total Free and Reduced	% of Total	% of student Enrollment
Baltimore City	72,617	28.7%	72.9%
Prince George's	52,148	20.6%	44.4%
Baltimore	27,463	10.9%	28.3%
Montgomery	27,169	10.7%	23.6%
Anne Arundel	11,318	4.5%	16.4%
Harford	6,550	2.6%	18.5%
Washington	5,878	2.3%	31.4%
Allegany	5,197	2.1%	49.2%
Frederick	4,948	2.0%	15.5%
Charles	4,806	1.9%	23.9%
Wicomico	4,800	1.9%	36.8%
Howard	3,887	1.5%	10.5%
St. Mary's	3,591	1.4%	27.0%
Cecil	3,390	1.3%	24.2%
Carroll	2,481	1.0%	9.9%
Worcester	2,455	1.0%	38.5%
Dorchester	2,424	1.0%	50.0%
Caroline	2,342	0.9%	45.2%
Garrett	2,261	0.9%	44.7%
Calvert	2,053	0.8%	15.3%
Somerset	1,765	0.7%	60.6%
Queen Anne's	1,208	0.5%	20.4%
Talbot	1,188	0.5%	28.5%
Kent	1,071	0.4%	40.7%
Total State	253,010		

FISCAL YEAR 1998 PROGRAMS SERVING AT-RISK STUDENTS

INITIATIVE	TARGET POPULATION	INITIATIVE DESCRIPTION	NO. OF STUDENTS SERVED	FY 98 FUNDING
Extended Elementary Ed. Program (EEP)	Children who are 4 years of age and potentially at-risk of not succeeding in school.	Provide initial learning experiences to help children develop and maintain the basic skills needed for successful school performance.	9,880 children	$ 14,896,739
Non- & Limited English Proficient (NEP/LEP	Pre-Kindergarten through twelfth grade public and private (as requested) school children who speak a language other than English which has impacted on ability to learn in English.	Supports programs for NEP/LEP students that provide instructional assistance and services to enable these students to acquire and improve English language skills and cultural understanding and thus be able to participate successfully in the academic and social activities of their regularly assigned schools.	16,000 students	$ 7,797,000
Targeted Poverty	High poverty schools.	Funds may be used to extend or enhance the goals, objectives, and strategies in the school improvement plan.	119 schools	$ 26,163,360
State Dedicated Compensatory Education (SCE)	Poverty and educational need determine participating schools.	These funds augment federal Title I funds and are used to develop supplemental educational programs in schools with high concentrations of low-income children.	21,736 students (4,278 SCE only schools and 17,458 combined Title I/SCE schools)	$ 17,574,344
Title I: Part A Local School Programs	Schools with high concentrations of low-income students.	School-wide programs upgrade the school's education program. Targeted assistance programs provide services only to students who are below age and grade expectations.	62,125 students (302 schools)	$ 95,337,298
Title I: Part B Even Start Family Literacy	Parents, children, and other family members.	Family-focused program with integrated early childhood education, adult literacy, basic skills instruction, and parenting education.	263 students	$ 1,170,968
Title I: Other Migrant Education Migrant Head Start Delinquent and At-Risk	Children, ages 0-21, of migratory and seasonal farm workers, and their parents. Children and youth who reside in local correctional facilities and at-risk youth.	Regional summer school programs planned in conjunction with staff in the home base States of Florida and Texas. Supports partnerships between schools and correctional facilities to improve educational services and to prevent at-risk youth from dropping out of school.	3,694 students	$ 1,050,705
McKinney Homeless Assistance Act	Preschool age and school age homeless children and youth.	Ensures that all homeless children and youth have equal access to public education and that barriers to enrollment and attendance are removed. Funds also provide supportive services.	2,052 students	$ 262,460

INITIATIVE	TARGET POPULATION	INITIATIVE DESCRIPTION	NO. OF STUDENTS SERVED	FY 98 FUNDING
Challenge Schools	Schools that are low performing with respect to standards and/or have high mobility or ESOL rates or other mutually agreed to criteria.	Enables schools and their communities to create, implement, and monitor plans for focused school improvement.	36,000 students	$ 7,638,827
Reconstituted Schools	School eligible for reconstitution based on below satisfactory and declining performance with respect to MSPP.	Series of steps taken by the State, local school system, and designated schools to make structural changes to improve performance and be held accountable to State education standards.	39,000 students	$ 3,719,200
Dropout Prevention MD's Tomorrow Middle School Program MD's Tomorrow High School Program	Students in grades six to eight who are at-risk of not graduating. High school students who are at-risk of not graduating from high school (identified in eighth grade).	Two types of models provide services to improve student behavior and academic performance. Multi-year, year round instruction and support to help youth meet academic expectations, get a high school diploma, and transition to further education and/or employment.	6,784 students	$ 10,881,575
Annapolis Road Middle School	60 students exhibiting extremely difficult behaviors.	Year-round, extended day school providing academic instruction, social skills development, behavior intervention, counseling and support services, and family intervention.	60 students	$ 1,601,655
Disruptive Youth	Schools or clusters of schools to support the development and expansion of special programs for disruptive youth.	Provides a model continuum of prevention and intervention programs that encourage and promote positive behaviors and reduce student disruption.	7,500 students	$ 457,553
Children At-Risk	Funds are available to 24 school systems to conduct activities to benefit children at-risk. The Governor's Council on Adolescent Pregnancy also receives funds to support interagency teen pregnancy initiatives.	Programs, activities, materials and training for prevention of child abuse, youth suicide, and teen pregnancy.	Programs are aimed at training staff	$ 386,000
School Community Centers	Youth between the ages of five and twenty in each of Maryland's school systems.	Provides for the use of school facilities during non-school hours through coordination between local school systems and parks and recreation agencies. Provides comprehensive leisure and supplementary education activities.	100,000 students and families	$ 725,300
Safe and Drug Free Schools and Communities	K - 12 public and nonpublic schools.	Supports programs that prevent violence and the illegal use of alcohol, tobacco, and other drugs.	738,497 students	$ 5,672,592
Infants and Toddlers	Children from birth to age three who have developmental delays.	Provides early intervention services for children and their families.	6,609 children	$ 5,237,314

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Maryland State Department of Education
Fiscal Year 1998
At Risk - Summary Schedule

	Extended Elementary Ed. Program	Non- & Limited English Proficient	Targeted & Additional Poverty Pgms.	State Dedicated Comp. Ed.	ESEA I Title I Grants to LEAS	ESEA I Title I Even Start	ESEA I Title I Other (1)	McKinney Homeless Asst. Act	Challenge Schools	Reconstituted Schools	Dropout Prevention	Total Page 1
Allegany County	372 458	1 500	700 663	711 092	2 605 193	0	0	0	270 000	0	121 277	4 783 078
Anne Arundel County	1 027 258	220 000	1 390 683	435 418	4 521 130	0	0	0	620 000	210 000	598 038	9 078 529
Baltimore City	3 230 609	220 000	2 290 099	9 014 078	41 092 997	298 000	0	0	0	3 369 200	3 215 835	63 534 718
Baltimore County	1 020 741	600 000	3 314 720	1 202 871	9 478 329	134 663	0	0	600 000	0	745 008	17 188 742
Calvert County	280 071	9 500	248 940	109 127	700 440	107 440	0	0	0	0	103 893	1 563 123
Caroline County	283 230	20 500	339 574	159 543	681 221	88 200	0	0	300 000	0	87 631	2 045 898
Carroll County	148 238	38 000	283 487	138 053	881 638	101 108	0	0	0	0	125 078	1 725 590
Cecil County	605 489	14 000	408 245	195 440	1 158 304	0	0	0	0	0	155 755	2 538 233
Charles County	870 981	41 000	807 398	118 258	1 222 054	92 178	0	0	300 000	0	158 521	3 305 954
Dorchester County	319 984	18 500	357 162	168 418	1 000 431	80 041	0	0	300 000	0	103 893	2 344 210
Frederick County	580 818	84 500	802 180	257 847	1 382 472	65 000	0	0	0	0	147 881	3 309 600
Garrett County	358 000	0	348 404	195 892	1 051 180	0	0	0	0	0	103 893	1 955 863
Harford County	835 600	87 500	820 086	338 315	2 109 885	0	0	0	0	0	238 395	4 300 930
Howard County	178 000	361 500	449 784	189 567	1 222 054	0	0	0	0	0	131 218	2 543 121
Kent County	209 459	21 000	129 490	48 518	310 612	0	0	0	0	0	103 893	820 754
Montgomery County	900 241	3 617 500	3 320 281	833 561	7 354 581	0	0	0	1 000 000	0	580 885	18 447 149
Prince George's County	1 303 774	1 925 500	7 739 760	1 297 752	10 911 858	184 340	0	0	2 005 000	0	1 020 372	26 984 354
Queen Anne's County	273 874	11 500	155 412	84 018	423 982	0	0	0	0	0	103 893	1 031 259
St. Mary's County	606 300	26 000	475 177	230 452	1 320 885	0	0	0	0	0	134 835	2 755 415
Somerset County	255 371	18 000	269 818	118 002	677 554	0	0	0	0	140 000	103 893	1 579 138
Talbot County	279 458	17 500	147 580	58 302	498 505	0	0	0	0	0	45 998	1 002 942
Washington County	464 084	90 000	757 058	390 533	2 002 500	0	0	0	200 000	0	185 248	4 075 427
Wicomico County	727 458	88 500	595 581	429 883	2 148 984	0	0	0	0	0	109 477	4 098 884
Worcester County	215 844	22 000	303 881	83 148	938 930	0	0	0	0	0	107 870	1 880 697
Unallocated / Other	0	(5 000)	4	(7)	(1)	0	1 050 705	262 400	303 827	0	2 399 091	4 011 084
Total State	14 698 739	7 797 000	29 183 380	17 874 344	95 337 298	1 170 988	1 050 705	262 400	7 038 827	3 719 200	10 881 575	188 492 478

(1) ESEA I, Title I Migrant Educ., ECMHSP Migrant Children, & ESEA I, Title I Negl. & Delinq.

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Maryland State Department of Education
Fiscal Year 1998
At Risk - Summary Schedule

	ARMS (2)	Subcabinet Fund Programs Disruptive Youth	Children at Risk	School Community Centers	Safe and Drug Free	Infant & Toddlers Part H	Grand Total
Allegany County	0	3,000	10,000	22,403	54,930	107,212	4,960,821
Anne Arundel County	0	3,000	16,000	47,028	355,800	438,922	9,889,279
Baltimore City	0	3,000	16,000	63,725	1,869,078	831,304	66,317,825
Baltimore County	0	3,000	21,000	66,994	548,688	812,340	18,420,744
Calvert County	0	3,000	15,200	14,860	61,240	72,103	1,729,526
Caroline County	0	3,000	7,000	12,750	43,093	49,914	2,161,655
Carroll County	0	49,051	13,865	27,291	116,444	133,884	2,066,125
Cecil County	0	3,000	10,000	13,426	24,848	91,489	2,880,894
Charles County	0	69,000	13,000	18,444	100,974	110,911	3,618,283
Dorchester County	0	46,153	4,130	28,369	78,337	65,800	2,566,799
Frederick County	0	68,600	13,000	17,981	152,885	152,892	3,734,576
Garrett County	0	3,000	7,000	24,750	43,093	50,311	2,084,017
Harford County	0	3,000	13,000	17,098	172,813	240,500	4,647,219
Howard County	0	3,000	14,378	28,105	185,657	242,047	3,016,308
Kent County	0	3,000	7,000	12,750	44,324	39,459	927,287
Montgomery County	0	3,000	16,000	87,230	644,782	619,431	19,797,592
Prince George's County	1,601,655	85,399	16,990	73,918	608,204	575,910	29,926,430
Queen Anne's County	0	3,000	5,937	19,007	43,093	64,166	1,166,462
St. Mary's County	0	3,000	10,000	18,493	72,382	87,968	2,945,258
Somerset County	0	3,000	7,000	16,455	43,093	44,059	1,692,743
Talbot County	0	85,350	7,000	12,750	44,617	49,701	1,202,360
Washington County	0	3,000	12,500	14,676	96,375	131,242	4,333,220
Wicomico County	0	3,000	10,000	13,426	225,171	99,780	4,440,041
Worcester County	0	3,000	9,500	12,750	43,093	51,289	1,788,329
Unallocated / Other	0	0	110,500	62,613	0	275,000	4,459,197
Total State	1,601,655	457,553	386,000	725,300	5,672,592	5,237,314	200,572,890

(2) Alternative Middle School - Annapolis Roads Middle School

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Maryland State Department of Education
Targeted Improvement Program (TIP):
Comprehensive Statewide Students At-Risk Funding Proposal

Targets funding to three priority student populations:

- Students receiving free and reduced price lunches (FRPL).
- Limited English Proficient (LEP) students.
- Four year old children who live in the attendance area of Title I eligible schools (EEEP).

Targets funding to address the needs of teachers of at-risk students.

Five components of the plan:

Component 1 of the funding plan: Students in Poverty

Distributes a total of $21.8 million through the new Targeted Improvement Program (TIP). $16.3 million is distributed using a modified version of the current State compensatory education funding formula. This component is in addition to the current State compensatory formula. This formula substitutes the FRPL student count multiplied by a 2.5 percent of the current expense per pupil amount. Part two of TIP provides each school with a student population that is 25 percent or more FRPL eligible students a $8,000 grant for teacher development. Schools will be required to submit a plan on the uses of the funds to enhance teacher development in these schools.

Component 2 of the funding plan: Limited English Proficient Students

Increases the statutory LEP amount per student from $500 per eligible student to $1,350 and eliminates the 2 year LEP student count limitation specified in Section 5-206 of the Education Article.

Component 3 of the funding plan: Pre-Kindergarten (EEEP)

Provides funds to increase the number of Extended Elementary Education Program (EEEP) sites by 24 ($1.7 million) and provides $1.7 million to increase funding for 204.5 existing sites to a level of $65,000 per site. Provides $1 million to be distributed to local systems based on the submission of comprehensive plans to address early intervention educational need of targeted four year old populations whose needs are not fully met by the existing EEEP program.

Component 4 of the funding plan: Teacher Mentoring Program

Provides $5 million ($3 million in new funds and $2 million budgeted in the Challenge Schools program) for a pilot project to determine best practices of teacher mentoring efforts modeled on the Baltimore County Mentoring Program. Enhanced mentoring efforts for teachers working with at-risk students and issues of teacher retention in schools with a high at-risk student population is a priority of this proposal. An evaluation of the efficacy of the pilot program is required and the evaluation is to be presented to the State Department of Education for consideration as a model for statewide implementation.

Component 5 of the funding plan: Resources for Statewide Accountability Tracking

Maryland State Department of Education estimates that an investment of $3 million is needed to enhance the department's program evaluation and management information systems capabilities to support the accountability provisions of the proposal. **This amount is not included in the funding proposal.**

Accountability

- Requires local school systems to submit a comprehensive plan to increase the performance of children at risk based on MSDE criteria for measuring student success. This plan must integrate funding from state, federal, and local programs targeting children at risk. Participating schools must submit semi-annual and annual progress reports containing information on program implementation and the resulting outcomes.

- Codifies the department's proposal and includes a trigger for the continuation of funding for these programs. It is recommended that the new section of the Education Article include the components of this proposal and sunset after a specified period of time. Sections 5-206 (Grants for non- and limited-English proficient students) and 5-207 (Targeted poverty grants -- $8 million in current law would be added to TIP) of the Education Article would be repealed. The efficacy of programs for students at risk will be evaluated by MSDE. Depending on the results attained from this comprehensive approach to serve at-risk students, the General Assembly will have the opportunity to deliberate the merits of this program.

MARYLAND STATE DEPARTMENT OF EDUCATION

TARGETED IMPROVEMENT PROGRAM: COMPREHENSIVE STATEWIDE STUDENTS AT RISK FUNDING PROPOSAL

1. Introduction

This proposal seeks to enhance the Department's emphasis on improving student achievement by targeting assistance to students who have been identified as failing, or at risk of failing, to meet Maryland's challenging content and student performance standards as measured by State and locally developed measures of student learning and educational performance. The standards established by the Maryland School Performance Program apply to all students in Maryland, and standards established by local school systems demand success from all students attending schools in the local system. But, barriers to learning differ from child to child and achieving success becomes more complicated for students facing significant barriers to learning such as poverty, limited English proficiency, and high mobility. Therefore, ensuring success in school for each child, regardless of the conditions in which the child lives, is key to the success of Maryland's systemic education reform efforts.

2. Background

The *1996 Maryland School Performance Report* clearly showed school reform driving students, schools, and local school systems toward higher levels of performance. Not only were attendance rates up and dropout rates down, but student performance on the State functional tests held steady and again climbed on the Maryland School Performance Assessment Program (MSPAP) in grades 3, 5, and 8. In 1996, 19 of 24 school systems posted higher achievement on the 1996 tests over 1995 results. In 1993, only four school systems had 40% or more of students at the satisfactory level on the MSPAP. In 1996, 16 school systems had 40% to 60% of students at satisfactory level.

However, a large number of students are still far away from meeting Maryland's challenging academic content and performance standards. The large majority are students who are from poor families -- especially African-American and Hispanic males -- and students who are limited English proficient or whose families are highly mobile. Since the early 1980's, Maryland has invested financial resources in schools having high concentrations of poor children and where the need to improve performance is most critical through the pre-kindergarten Extended Elementary Education Program for disadvantaged four-year-old children, the Compensatory Education Program, and the Targeted Poverty Grant program. Since 1994, the State has provided funding for limited English proficiency services. The federal Title I programs provide resources for additional intervention and prevention services to children in high poverty schools. Maryland's local school systems historically have targeted the federal and State compensatory education programs in high-poverty elementary schools.

There remains, however, groups of students who need additional assistance to achieve the high standards the State and local school systems have established for all children but who do not attend schools that receive federal Title I and State assistance. This is especially true of students who receive Title I and other compensatory education services in the elementary grades but are not provided the supplemental support when they move to the middle and high school grades because these schools may no longer qualify for Title I funding.

The Department has moved forward in providing local school systems with a planning process that helps them to consolidate and integrate the Title I, Targeted Poverty, and State Dedicated Compensatory Education into one plan with one overarching set of goals. To increase the coordination across these particular State funded programs, the Department will require local school systems to develop a single application and develop a consolidated plan that also includes, in addition to these three programs, the Extended Elementary Education Program and Grants for Limited English Proficient Students.

3. Proposal

This proposal creates a new funding program called the "Targeted Improvement Program" that will target assistance to pre-kindergarten four-year-old children, and students who are limited English proficient or highly mobile, and other groups of K - 12 children who are failing, or at risk of failing, to meet State and local academic content and performance standards. The program will be coordinated at the State and local levels with federal Title I programs and the Dedicated Compensatory Education and Targeted Poverty Grant programs. In addition, this program has a teacher mentoring component to address the needs of teachers of at-risk students.

Targeting resources to lowest performing students is consistent with the Department's ongoing emphasis on school reform. The goal of TIP is to improve teaching and learning to enable identified students to meet local and State academic content and performance standards that all children are expected to master. To accomplish this goal, the Department will distribute TIP grants to local school systems based on four components that address specific needs of the at-risk student population and the teachers of these students.

The first component distributes grant funds using a modified version of the current State compensatory education formula. The second component increases the statutory Limited English Proficient (LEP) students grant from $500 per eligible student to $1,350 and eliminates the 2 year LEP student count limitation specified in Section 5-206 of the Education Article. The third component provides funds to increase the number of Extended Elementary Education Program (EEEP) sites by 24 ($1.7 million) and provides $1.7 million to increase funding for 204.5 existing sites to a level of $65,000 per site. In addition, $1 million is to be distributed to local systems based on the submission of comprehensive plans to address early intervention educational need of targeted four year old populations whose needs are not fully met by the existing EEEP program. The fourth component provides $5 million ($3 million in new funds and $2 million budgeted in the Challenge Schools program) for a pilot project to determine best practices of teacher mentoring efforts modeled on the Baltimore County Mentoring Program. Enhanced mentoring efforts for teachers working with at-risk students and issues of teacher retention in schools with a high at-risk student population is a priority of this proposal.

An evaluation of the efficacy of the pilot program is required and the evaluation is to be presented to the State Department of Education for consideration as a model for statewide implementation. The fifth component recognizes the need to enhance the State Department of Education's program evaluation and management information systems capabilities to support the accountability provisions of the proposal. The department estimates that approximately $3 million is needed to implement this component. This amount is not included in the funding proposal.

Local school systems will include in their Consolidated Compensatory Education Plans a listing of schools that will receive the funds and a description of the processes and measures the school system will use to evaluate the effect of TIP on improved student achievement.

4. Key Components of Targeted Improvement Programs

The overall purpose of TIP is to provide additional assistance to students who are at risk of failing to meet the high standards the State and local school systems have established for all children. To accomplish this purpose, local school systems will identify schools having high numbers of students who are failing, or most at-risk of failing to meet Maryland's challenging content and student performance standards as measured by State and locally development measures of student learning and educational performance. To receive TIP funding, each school's school improvement plan must include the key components that must be approved by the local board of education. The key components include:

A. Impact on Improved Student Performance: All schools, regardless of the demographic characteristics of their students, are held accountable for high levels of educational attainment of their students through the Maryland School Performance Program. TIP schools will submit to the Department semi-annual and annual progress reports that include specific data about the nature and extent of changes in student learning for students participating in TIP.

B. Data Collection: A description of the measures that will be used and the process by which data will be collected and evaluated to measure change in student learning and other educational performance attributable to the TIP project. The Department will develop criteria that schools will use to measure the effectiveness of TIP program strategies.

C. Enriching Curriculum and Instruction: The TIP programs will focus on increasing the amount and quality of learning time for participating children and having highly qualified and trained professional staff. Participating schools will be required to use effective instructional strategies that:

- Promote activities and effective practices that are based on effective means of improving children's achievement.
- Give primary consideration to providing extended learning time such as an extended school year, before-and after-school, and summer programs and opportunities.

- Help provide an accelerated, high quality curriculum.

- Minimize removing children from the regular classroom during regular school hours for TIP instruction.

- Assist preschool children in the transition from early childhood programs, such as Head Start or the Extended Elementary Education Program, to elementary school; transition from elementary school to middle school; and transition from middle school to secondary school.

- Promote the use of education technology as a means to improve the performance of students, enhance the effectiveness of teachers, and strengthen the engagement of parents and the community.

D. Increased Parental Involvement: A description of strategies the TIP project will use to increase parental involvement, such as student progress meetings with parents and home-school compacts that define how parents, the school staff, and students will work together to help students achieve high academic standards.

E. Integration and Consolidation of Existing and Additional Resources and Services to Address Problems that Interfere with Learning: A description of how services are coordinated, consolidated, and delivered to provide a continuum of services to children in the various grade spans of the school.

5. MSDE Headquarters Support

The Department will request funds in its headquarters budget for administration and program improvement responsibilities related to these programs. These funds will be used for the following purposes:

- Salaries and Wages: Salaries and wages for program managers and staff for the various program areas. These staff will be responsible for providing leadership to the Department and to local school systems in planning, developing, and evaluating the process of providing TIP learning experience for students.

- Data Processing Services: All activities related to directing, managing, and supervising centralized data processing services related to maintaining a school data base, including systems analysis, programming, data entry, and data processing operations. Critical to the success of evaluating the comprehensive at-risk initiatives will be the development of a statewide database in partnership with local education agencies for tracking the progress of the students in the program. It should be noted that MSDE's capacity in this regard is limited at this time.

- Information Services: Activities concerned with developing reports and information related to effective practices and program evaluation.

- Training and Professional Development: Activities related improving competencies of local staff and instructional services. These include costs for regional and statewide workshops and conference, school based training and demonstrations, payment for substitutes for classroom teachers to attend staff development activities, and extra pay for instructional staff to attend summer workgroups to enhance the instructional program.

6. Accountability

The State investment in improving the performance of at-risk students must be tied to strong objective state defined performance measures. **To ensure comprehensive programs that are driven by addressing the needs of at-risk students, systems will be required to integrate different funding streams to deliver a more comprehensive and coordinated program.** MSDE will require local education agencies to submit comprehensive plans in accordance with MSDE criteria.

Since the measure of success is improved student achievement, school systems must submit semi-annual and annual evaluations on the efficacy of their intervention strategies. This information will be used by stakeholders to modify and/or enhance strategies that are having a measurable impact on the performance of students. In addition, this information will be available to the State Board of Education, the Governor and the General Assembly for consideration of future funding.

The Department recommends that this proposal be codified and include a trigger for the continuation of funding. MSDE recommends that the new section of the Education Article include the components of this proposal and sunset after a specified period of time.

New Targeted Improvement Program Allocation
Fiscal Year 1999

Local Unit	Targeted Improvement Program		Non- and Limited English Proficient	Extended Elementary Education	Total Grants	
Allegany	722,749		2,550	57,541	782,840	
Anne Arundel	844,507		421,800	200,241	1,466,548	
Baltimore City	5,761,006	*	464,700	694,491	6,920,197	
Baltimore	7,134,054	**	1,198,950	100,759	8,433,763	**
Calvert	137,000		17,000	143,029	297,029	
Caroline	334,496		49,900	51,770	436,166	
Carroll	230,919		76,450	14,270	321,639	
Cecil	358,130		27,650	182,011	547,791	
Charles	445,301		76,400	144,439	666,140	
Dorchester	283,985		34,900	70,036	388,921	
Frederick	437,214		115,550	180,082	732,846	
Garrett	305,975		0	36,312	342,287	
Harford	629,207		117,300	174,311	920,818	
Howard	227,265		713,900	72,500	1,013,665	
Kent	115,853		40,050	55,541	211,444	
Montgomery	1,641,212		7,146,050	313,759	9,101,021	
Prince George's	4,931,607		3,814,150	336,226	9,081,983	
Queen Anne's	101,317		21,400	59,426	182,143	
St Mary's	382,796		55,300	261,134	699,230	
Somerset	256,091		31,200	39,729	327,020	
Talbot	91,159		32,750	20,541	144,450	
Washington	669,225		171,050	103,416	943,691	
Wicomico	563,530		173,000	22,541	759,071	
Worcester	160,061		44,250	51,656	255,967	
Total State	26,764,659		14,846,250	3,365,761	44,976,670	
			Competitive EEEP	1,000,000	1,000,000	
			Total Funds	4,365,761	45,976,670	

* Baltimore City's estimated allocation represents 50% of the formula calculation total.

** Creates a statewide model for the training and retention of teachers in high-risk schools which is being established in Baltimore County. The amounts shown (includes $2 million budgeted in the Challenge Schools Program

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Prepared by: MSDE Division of Business Serv

TASK FORCE ON DROPOUT PREVENTION, INTERVENTION, AND RECOVERY

PRESENTED TO
TASK FORCE ON EDUCATION FUNDING EQUITY,
ACCOUNTABILITY, AND PARTNERSHIPS

MARYLAND STATE
DEPARTMENT OF EDUCATION
October 22, 1997

Task Force on Dropout Prevention, Intervention, and Recovery

1. **Charge:**

    - Develop the vision for a comprehensive system of school dropout prevention, intervention, and recovery in Maryland within the context of the State's education reform initiative.
    - Make specific recommendations to decrease the gap between what currently exists and that which is needed to achieve the vision.

2. **Core Assumptions:**

    - Diverse factors and circumstances influence students' decisions to drop out of school.
    - Students' decisions to drop out of school evolve over time and are the product of experiences in school and other external factors.
    - School dropouts are at an extreme disadvantage in the workplace, and in pursuing opportunities for further education.
    - Rigorous standards and high expectations, only when combined with integrated and continuous systems of support, have the capacity to result in fewer school dropouts.
    - Dropout prevention, intervention, and recovery are critical aspects of education reform and school improvement.
    - Systemic change to improve the dropout rate is possible within the confines of realistic funding.

3. **Guiding Principles** - A comprehensive system of dropout prevention, intervention, and recovery will:
    - be student focused to address the range of needs, factors, circumstances, and situations that contribute to students' decisions to drop out of school.
    - begin with early learning years and continue through the high school years and the key points of transition to establish a continuum of structures, strategies, and practices in support of students' achievement.
    - be guided by local needs and planning and integrated within the context of local education reform and school improvement efforts.
    - be results driven and cost effective with accountability as a key element considered in design, planning, and implementation.

4. **Process and Timeline - October 1996 through January 1998:**

    Review Background Information (1/97)
    Develop Vision (2/97)
    Compare Present Situation with Desired System (4/97)
    Draft Recommendations and Report (10/97)
    Receive Statekholders Input (12/97)
    Finalize Report of Recommendations and Deliver (1/98)

TASK FORCE ON DROPOUT PREVENTION, INTERVENTION, AND RECOVERY

MEMBERSHIP LIST

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TESTIMONY OF FREDERICK COUNTY COMMISSIONER ILONA HOGAN BEFORE THE TASK FORCE ON EDUCATION FUNDING EQUITY, ACCOUNTABILITY AND PARTNERSHIPS

October 22, 1997

Thank you for this opportunity to testify before this joint subcommittee meeting on programs for at-risk children.

Allow me to begin by telling you that last night the Frederick Board of County Commissioners adopted our 1998 Legislative Package which will be presented to our State Delegation on October 31, 1997. Included in this package is the following position statement on School Funding Formulas:

> The majority of school or State school funding is allocated among the counties by the APEX formula. This formula was originally created many years ago. It has not been substantially revised since its initiation. Over the years, the formula and its underlying assumptions have become dated. Fast-growing counties like Frederick County are no longer treated equitably under the State school funding formulas. The State school funding formulas should be revised so that Frederick County receives a more equitable share of State school funds.
>
> Various changes to the State funding formula have been proposed in past legislative sessions and will likely be proposed during the 1998 legislative session. The County Commissioners request the Delegation to closely review each of these proposals for its impact on Frederick County. In particular, Frederick County would like to see the impact of its fast-increasing school population taken more appropriately into account.

Today, however, we focus on programs for at-risk children. In Frederick County we have .14% of our middle school students classified as at-risk which is considered excellent by State standards. Our high school at-risk students equate to 2.82% of the total high school population. There are three programs which are unique to our county to assist our at-risk student population.

1. Frederick County Public School Support Program has been funded for 20 years and places a master teacher in each middle and high school trained in counseling to work with the family, teachers and the at-risk student. This teacher has a small enough caseload to stay on top of these areas of the students life and will be in constant contact with all entities involved. This is totally funded by Frederick County.

2. Community Agency School Service (CASS) Program is a county-wide program with the case coordinator on the BOE payroll. There is one coordinator per school feeder system area. The intent of this program is to be able to work with families requiring services so that necessary assistance is provided without duplication and is funded in total by Frederick County.

3. Heather Ridge serves at-risk students that are behaviorally problematic in the normal classroom. Not all of these students need special education. This school enjoys a 20 year history and has never refused a student. 100% of the funding for Heather Ridge is provided by Frederick County.

Our at-risk student population are served by four additional programs. Character Counts Program is new and grant funded at this time. Frederick County was one of 5 counties in Maryland to receive a grant for this program. Maryland was one of only five states to receive the grant monies. Every teacher receives training to emphasize the importance of developing a positive character and this is done consistently during regular classroom instruction.

Consolidated Grant on Youth Suicide, Teen Pregnancy, and Child Abuse. It is now one grant for which Frederick County gets $13,000. The money is used to train staff in new procedures in mental health issues as related to child abuse to include the training of new teachers and home teachers. ICAP has worked with the BOE in prevention of teen pregnancy. BOE, in conjunction with the Frederick County Hotline, conducts stress reduction workshops for school counselors in the latest stress prevention methods. There are approximately 100 cases each year in Frederick County of a student or a friend of a friend who walk in to a school counselor's office and exclaims a suicide attempt.

The "Kids Like Us" Program is school counselors working with the Health Department and Project 103 to identify students in frightening domestic environments. With parental consent these students are placed in a special program to deal with their emotional stress.
Kids Like Us won the State School Award approximately five years ago.

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Intensive efforts are made in the Frederick County School System to address incidents of discrimination involving racism, sexual orientation, gender, ethnicity, religion or the handicapped. The BOE Minority Advisory Committee discusses and resolves these incidents. Procedures to remedy these problems include administrative steps and counseling efforts. All incidents are reported publicly via the media once a year for the sole purpose of making Frederick County aware of the type of discriminatory practices that are occurring in the school system. Additionally, all counselors are trained to deal with problems of discrimination.

80-90% of at-risk students families are below the poverty level and frequently below $10,000 annual income. They are poor readers. Therefore, Frederick County schools put special emphasis on reading programs for these students.

Again, thank you for this opportunity to tell you something about our programs for our growing at-risk population and our growing general student population.

Testimony before Legislative Committee on Equity Funding
October 22, 1997

Dr. Jack Dale, Superintendent
Frederick County Public Schools
Chair, PSSAM Legislative Committee

Thank you for inviting me to address you today on the important issue of equitable funding to fully educate all of our children, including those from less wealthy circumstances. I am here as not only the Superintendent of Schools for Frederick County — where there are students living in impoverished circumstances — but as legislative committee chair of the Public Schools Superintendents' Association of Maryland.

I am sure you are well acquainted with the research which shows a strong correlation between socio-economic status and student achievement. This is well documented throughout the nation — in all states; in all parts of states; in large urban settings and in small, poor rural settings; in large schools; in small schools; in single-parent families and in two-parent families; in minority as well as majority populations. The issue is not the identification of poverty, nor the identification of poor achievement, nor of rediscovering the correlation between the two.

The issue is how we, as the educational policy makers and leaders in the state, and the nation, will intervene. We must determine how to overcome the significant, overwhelming negative influence of poverty on a child's education. How can we ensure all kids will achieve at much higher levels and, in particular, that children from impoverished circumstances will achieve with their more affluent peers? Is it possible?

Breaking the cycle of poverty is an issue which I have personally decided must be addressed in Frederick County. I am here to offer some of my thoughts and my learning about our potential efficacy in this critical area. I have come to believe that the core issue is what I will label *The Opportunity to Learn and Achieve*.

The Opportunity to Lean and Achieve is more prevalent in affluent circumstances and is significantly absent, or hidden, in children of poverty. A child's *Opportunity to Learn and Achieve* is highly dependent on the culture, attitudes, expectations, values, beliefs and models of success that surround and permeate that child's life. This idea is not new. Effective schools research, best practices research, resilience research, research on students at risk, research on low achieving students, research on headstart programs, research on early childhood education initiatives, all continually point out that children from impoverished environments do not have an equitable *Opportunity to Learn and Achieve.* Neither we as adults, nor the children themselves, expect them to excel. Why is that?

How can we overcome these entrenched negative influences on children? Two meaningful interventions will increase *Opportunity to Learn and Achieve* for students from less affluent circumstances. The first intervention is to create a school environment where the culture, attitudes, expectations, values, beliefs and models of success that surround and permeate that child, demonstrate the value of hard work, achievement and high levels of success. The second intervention is to accelerate that child's learning in a way that removes the achievement deficits of earlier years.

How do we know whether or not we are successful on either one of these fronts? We look at student achievement trends. We look at the gap in achievement between students of normal and higher SES versus those in lower SES conditions and ask what is happening to the gap. If the gap in achievement remains about the same over time, we have only addressed the first intervention. Circumstances are only sufficient to assure that the children do not loose ground. If the gap is closing, and closing rapidly, only then have we created an environment where the *Opportunity to Learn and Achieve* is equitable for all children.

To determine how to best implement these two interventions — for improving achievement over time and closing the gap of achievement between groups — I turned to research. In so doing, I came across an excellent summary of successful intervention strategies that address these two *Opportunity to Learn and Achieve* standards. Ironically, the summary I came across was in the form of testimony given by an education leader from our own state — Dr. Sam Stringfield of Johns Hopkins University. Dr. Stringfield's testimony was as an expert witness in the Philadelphia School District's lengthy desegregation case. For your reading, I offer his testimony today and wish to highlight a few of his very pertinent conclusions.

Dr. Stringfield's first conclusion is that programs exist which have been and continue to be successful in closing the achievement gap — circumstances where children from impoverished situations have in fact sustained achievement levels on par with their more affluent peers. These programs are proven and replicable. They exist right here in Maryland.

The second conclusion is that in all cases, the interventions require either a lower student-to-staff ratio, or more instructional time, or a combination of the two. If students are to increase learning and achievement, they will need to spend more significant time with a trained teacher. Longer days, longer school years, and more one-on-one or small group intervention time will be key.

The third, and less well-known, conclusion is that neither of the other two interventions can succeed unless the programs have stable, long-term support. Stringfield states: "When funding is for a finite period, even for as long as five years, the 'temporary' nature of the project can be used effectively by opponents as 'proof' that the reform will not last. The repeated threat of losing support ... can be almost as effective as real loss in undermining the viability of a program."

Even given five years of funding, the benefits of intervention may not last! This is a substantive finding. Not only must we pay attention to sustained support for change and improvement, but we must also pay very close attention to perceived and real LONG-term support.

We must institutionalize the support. We must institutionalize interventions that encourage all children to learn and achieve at levels they are capable of attaining. We must institutionalize the support and interventions so that they reach our children in poverty. We must institutionalize the opportunities to close the gap in achievement.

As you consider the set of appropriate public policies, I urge you to review the findings of the staff at Johns Hopkins and to recognize that children are in poverty all around us. Each of these children deserves the *Opportunity to Learn and Achieve* with their more affluent peers. We must empower them by providing increased instructional time and consistent, long-term intervention programs. Our decisions on the critical funding issues before us must break the cycle of poverty through equitable education for children all across our state.

PHILADELPHIA DESEGREGATION CASE
Expert Witness Report
Sam Stringfield, Ph.D.
Johns Hopkins University

Research on Effective Instruction for At-Risk Students

Overview

Several studies have demonstrated that, with proper schooling, impoverished African American and other minority students are capable of achieving at levels that demonstrate proficiency and are consonant with achievement levels of non-poor, white students. Other analyses are equally clear that in most high-poverty, predominantly minority contexts, including Philadelphia, most African American students do not achieve at these levels. These seemingly conflicting findings represent clear evidence of the need for--and potential of--targeted school improvement in schools serving large numbers of racial and ethnic minorities, and other groups of students placed at risk.

In this report we review research from promising programs, reform designs, and school components that have been found to be related to enhanced achievement among historically disadvantaged young Americans. We examine reasons why several no-doubt well intended efforts may not have produced the desired results. Finally, we identify several conditions found to be necessary for improving the academic achievement and other educational outcomes of Black students in high-poverty schools.

Race as an At-Risk Factor

National data on schools and students show that minority students are especially likely to be low achievers in school (Puma, Jones, Rock, & Fernandez, 1993). Black and Hispanic children are twice as likely as White children to be low achievers, and three times as likely to attend high poverty schools. The reading, writing, and math skills of Black and Hispanic children are below those of White children (Natriello, McDill, & Pallas, 1990). Black and Hispanic students are more likely than White students to drop out of high school, with extremely conservative estimates of 17, 18, and 12.2 percent respectively (Natriello, McDill, & Pallas, 1990).

Because of the close relationship between race and socioeconomic status, minorities are especially likely to be educationally disadvantaged. Forty-six percent of Black and forty percent of Hispanic children live below the poverty line, compared to 12 percent of White children (U.S. Bureau of the Census, 1988). Poor children are twice as likely to be retained (Bianchi, 1984) or to drop out of school (Stedman, Salganik, & Celebuski, 1988). Students living in poor communities score lower on achievement tests (Applebee et al., 1988). For example, the authors noted that the average 17-year-old in a disadvantaged urban setting scores at the same level as the average 13-year-old in an advantaged urban area.

Recently, writers have raised the troubling hypothesis that children of poverty do not merely not achieve, but that they are genetically incapable of achieving at high levels (Hernstein & Murray, 1994). Predating the current debates by 15 years, Ron Edmonds' argument (1979) reasoned that one would only have to identify one school in which large numbers of urban poor children were achieving at high levels to counter a genetic-limitation hypothesis.

Diverse Examples of Highly Successful School Improvement Efforts

Extensive experience, well researched, shows there are systemic school strategies which work for students in high-poverty schools, taking large numbers of poor, minority, initially low-achieving students to the grade-level achievement or better.

Given that predominantly poor, overwhelmingly minority, initially low-achieving students in these schools demonstrated reading comprehension levels near or above the national average by the end of third grade, there is good reason to conclude that most children of poverty, when well educated, can achieve at similar levels. Current national average achievement can be viewed as an achievable benchmark for schools serving America's children of poverty.

The following paragraphs overview research on schools implementing replicable school improvement models. In each case, the data presented are taken from a school serving an overwhelmingly racial/ethnic minority community. In each case, over several years the school was able to produce academic achievements that were at or above national averages.

High/Scope: Perry Preschool Program

The Perry Preschool program demonstrated the potential of long-term effects of preschool programs. Perry Preschool was a five-year experiment in which students were randomly assigned to an intensive preschool, which used the High/Scope curriculum, and to a control group. The High/Scope model involves a student-centered, cognitive developmental curriculum. The Perry Preschool Program study encompassed five waves, from 1962 to 1967, of preschool and control students. All 128 students were African-American and of low socio-economic status.

Extensive research has identified short-term (i.e., through grade two) differences in IQ, favoring preschool students. Preschool students spent less than half as much time in special education programs in school (Barnett, 1993). Long-term effects included higher rates of school completion, and lower levels of unemployment, and fewer teen pregnancies at age 19 (Berrueta-Clement et al., 1984). By age 27, more Perry Preschool students had graduated from high school or earned a GED certificate (71%) compared to the control group (54%). The difference was especially strong for women (84% vs. 35%). Program participants scored significantly higher on educational tests at ages of 4 to 7, 14, 19, and 27. Adults who had attended the Perry Preschool had half as many arrests and were less likely to be arrested five or more times. Further, their economic

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outcomes were better. More members of this group were earning higher salaries at age 27: 29 percent were earning at least $2.000 per month. compared to only seven percent of the control group. More of the women were working (80% vs. 55%). Program participants were more likely to own their own homes (36% vs. 13%) and two cars (30% vs. 13%). Finally, 59% of program participants received social services such as welfare within the past 10 years. compared to 80% of the control group (Schweinhart & Weikart. 1993).

Evidence from a single program demonstrates what is *possible* to accomplish with at-risk students. Evidence from a series of programs and successful replication demonstrate what is *reasonable* to accomplish. Perry Preschool is only one of a number of highly successful preschool programs targeting at-risk children. Underlying early childhood programs is the premise that investing in the education of at risk students early can be more effective and cost efficient than later remedial programs.

Although the effects of preschool programs alone on IQ tend to fade. preschool attendance is associated with more lasting effects on other indicators. For example. preschool programs can lower later special education referral. retention. and dropout rates (Berrueta-Clement et al.. 1984: Gray, Ramsey, & Klaus. 1983). Further. longitudinal studies suggest that early childhood programs may reduce likelihood of delinquency in the future (Zigler, Taussig, & Black, 1992).

Research on early childhood and preschool programs suggests that these interventions may have short-term cognitive and long-term academic and social impact. Programs most likely to have a large and lasting impact will:

- start early,
- start intensively, providing a developmentally appropriate environment and activities.
- involve the child for multiple years. and
- connect with follow-up programs in elementary school (Fuerst & Fuerst. 1991; Jester & Guinagh, 1983; Wasik & Karweit. 1994)

Success for All: Francis Scott Key School

Like Perry Preschool. Francis Scott Key School demonstrates that a targeted. research-based, educational program can help young at-risk children overcome educational defic[illegible]. In 1988. Francis Scott Key staff voted to use the Success for All program to improve reading skills. Success for All is designed to see that students begin school with reading success in the early grades and then maintain their success through the elementary years. Critical components include the following: research-based preschool. full-day kindergarten. beginning reading program. one-to-one tutoring. homogenous reading groups. eight-week regrouping, cooperative learning approaches. family support services. and a program facilitator.

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Key served 622 students, grades kindergarten through five, in southern Philadelphia, Pa. Approximately 96 percent of the school's student population received free lunch. Twenty-one percent of the students were classified as White, with the remainder being recent southeast Asian immigrants, African Americans, and other minorities. When Success for All was begun in this school, students of all races in the school were consistently scoring below national averages, with 1988 mean reading test score averages as low as the 17th percentile in second grade.

Over the first three years of implementation of the Success for All program at Key, achievements rose dramatically (Slavin & Yampolsky, 1992). Gains by Asian students during the first three years of study were consistently large and positive, averaging more than a full standard deviation more than comparable controls. Effects on first and second grade non-Asian (e.g., Black and White students) were also positive, with effect sizes ranging from effect sizes of +.30 to +1.15. Virtually all of these gains were both statistically and educationally significant.

Subsequent studies of Success for All at Key have found that while the community being served by Key school is increasingly African American and levels of free-lunch receipt have remained near 100%, achievements have remained above district and national averages (Rossi & Stringfield, 1995). Students who began school at particular educational disadvantage achieved higher after three years of the program than similar students in similar schools (Stringfield, Millsap, Scott, & Herman, 1996). At pretest, below-average Key students were reading at lower levels than below average students in the control group, high-poverty schools. Yet over their first three years in school, initially low achieving students at Key produced achievement scores that substantially exceeded both those of other students in high-poverty schools, and those of initially low achieving students in typical schools. These Key students surpassed the national average (fiftieth percentile).

The research base on Success for All confirms the findings in Francis Scott Key. Longitudinal studies, using matched control students in matched schools, indicate that Success for All improves student achievement, especially reading achievement (Madden, Slavin, Karweit, Dolan, and Wasik, 1993; Slavin, Madden, Karweit, Dolan, and Wasik, 1992). The most at-risk students, those who score lowest on the pretest, show the greatest improvement (Slavin et al., 1992). Success for All also reduces retention and special education assignment, although eliminating retention is a program policy rather than outcome (Madden et al., 1993; Slavin, Madden, Dolan, Wasik, Ross, and Smith, 1993). Program effects are maintained for at least five years (Slavin, Madden, Dolan, Wasik, Ross, and Smith, 1994). Successful replication suggests that the program can work in diverse circumstances (Slavin et al., 1993, 1994). Further, the longer a school has been implementing Success for All, the stronger its impact on students.

The Success for All program at Francis Scott Key School has been successfully replicated across the United States. Success for All demonstrates that children at risk of failure can succeed in school. The great majority of studies of Success for All have been conducted in schools that serve very high proportions of students placed at risk. and virtually all demonstrate similarly positive effects (for review, see Slavin et al., 1996).

The School Development Program: Lincoln Bassett Elementary School

Like Success for All. James Comer's School Development Program provides evidence that targeted school programs can affect the lives and learning of at-risk children. James Comer developed and implemented a schoolwide restructuring project. the School Development Program. to address the needs of the whole child. This program emphasizes school-based mental health services, parent involvement. and teacher involvement in restructuring. Central to this model is a school management and governance team composed of the principal, teachers, parents. and support staff. This team develops the school's "master plan." A mental health team addresses school climate issues as well as specific student and teacher problems. The school development program is essentially "content-free" and, in principle, could be adapted to diverse local curricula.

Lincoln Bassett Elementary School. in Baltimore. Maryland. used the School Development Program to address the needs of their high poverty (over 90 percent free lunch). minority (95 percent African American) student population. When the study began, reading comprehension levels were below the national average for low achieving students in high-poverty schools. During their first three years in school, initially low-achieving students produced achievement scores that exceeded both those of other students in high-poverty schools and those of initially low achieving student in typical schools. approaching the national average score by the end of third grade (Stringfield et al., 1996).

The success of the program is not limited to one site. Numerous school- and district-level evaluations have found the School Development Program to increase student achievement. measured by standardized tests and grades, in comparison to similar schools (Boger, 1989: Cauce. Comer and Schwartz. 1987; Comer, 1988; Haynes and Comer, 1990. 1991: Haynes. Comer. and Hamilton-Lee. 1988b, 1989: Joyner. 1990). Because this model focuses on children's personal, social. and academic growth. non-academic outcomes also are relevant. Students in this program tend to have better self-concept compared to control groups (Boger, 1989; Haynes and Comer, 1990; Haynes and Emmons, 1990a. 1990b, 1990c; Joyner. 1990). Aggregated data analysis over four years in a Michigan district shows that SDP schools achieved significant declines in suspension and absence days and amount of corporal punishment compared to non-SDP schools (Haynes. Comer, and Hamilton-Lee, 1988a).

High Standards: Nathaniel Hawthorne and Barclay Elementary Schools

Many other research-supported reforms. like the programs described above. share the philosophy that high expectations and standards contribute to above-average achievement for at-risk students. Core Knowledge, for example. builds on the premise that all children can learn through a challenging curriculum. Preliminary findings suggest that Core Knowledge works. Nathaniel Hawthorne Elementary School is one site using

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the Core Knowledge curriculum. The school is located in a large city near the U.S.-Mexican border, and serves a high at-risk population. Ninety-six percent of the students received free or reduced price lunches. 28 percent were classified "limited English proficiency," and 91 percent were minority. Yet by the fifth grade, the students' academic achievement was at or above the state average (Schubnell, 1996). The classes maintained a high level of academic discourse. For example, in a focus group activity, fifth graders described studying Macbeth, and compared Macbeth with Romeo and Juliet. Hawthorne was awarded the 1994 Luby Prize, which is given to two schools in the city of San Antonio that have shown substantial improvement.

Providing extensive staff development. Hawthorne used the "Core Knowledge Sequence: Content Guidelines for Grades K-6" for 50 percent of its curriculum and built in active learning and higher order thinking strategies. Nationally normed tests for 1992-93 showed Hawthorne students entered school below their grade levels, at the twentieth and thirtieth percentiles. Since the program has been put into place, students have graduated fifth grade at and above grade level, ranking at least on the fiftieth percentile in all areas (Mentzer & Shaughnessey, 1996; Schubnell, 1996).

Barclay Elementary School is another example of a school which produces high achievement through high standards. Barclay served a population that was 94 percent minority and 82 percent of the students received free or reduced-price lunch. Achievement test scores and attendance rates had fallen to very low levels, and student discipline had become unsatisfactory. In 1990, Barclay began to use the curriculum and instructional program of a well-known, elite private school.

In a longitudinal evaluation of the program (Stringfield, 1994), participating students were compared to prior classes of students in the same schools. At almost every time point, for every grade, program students surpassed the controls on reading, language arts, and math tests (Comprehensive Tests of Basic Skills and Educational Records Bureau). Control students consistently scored below the national average, sometimes as low as the twentieth percentile, while program students almost invariably scored above the national average, sometimes as high as the eighty-fifth percentile. On some tests, such as the language arts ERB, third grade Barclay/Calvert students in the programs scored higher on absolute measures (scale scores) than fifth grade students who were not in the program. These accomplishments are also evident in results on the Maryland School Performance Assessment Program. Barclay students in the Calvert program surpassed the city average in numbers of students achieving at least "satisfactory," despite a higher poverty rate in Barclay than the city. Further, absence rates dropped for students in the program faster than for non-program students at the same school, for an average of three fewer days of absences per year. Data from two achievement tests, a performance assessment, and absence rates indicate that a special program can dramatically raise the achievement levels of high poverty, minority children (for further information, see Stringfield, 1994; Natale, 1995).

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Common Characteristics of Highly Successful Improvement Efforts

The cases above share several common characteristics. First these schools serve high-poverty, predominantly minority populations. These are the groups that, in the larger population, are most likely to score poorly on measures of academic achievement. Second, these schools were engaged in some type of focused, carefully targeted school improvement/school restructuring program. Third, all have been well supported in multi-year implementations of their chosen reforms. Fourth, all consistently have been able to pull students academic achievements up to, and often above, grade level. Expressed as an equation:

High concentrations of poverty
+ identifiable racial/ethnic minority population
+ carefully chosen innovations
+ multi-year support for sustained implementation effort
= dramatically improved academic achievements.

That has been the formula for success in all of the above cases. It is the formula for a brighter future for Philadelphia's students placed at risk.

The problem is not the minority children. The above cases clearly demonstrate that when well supported with sound educational programming, the children are fully capable of competitive academic achievements.

These successful systemic strategies for school improvements do not stand alone. Educational research indicates that schools can make a difference in the relationship between a student's race and his educational outcomes. In groundbreaking research on effective schools, Edmonds identified a series of "effective schools" in which there was no relationship between students' family background and achievement (Edmonds, 1979, 1981). Supporting research shows that, even when controlling for student background, schools differ in average student achievement; thus, student achievement is not wholly tied to background characteristics (Rutter et al., 1979). A longitudinal study of especially effective versus ineffective schools shows that schools can have an effect beyond that associated with student background and can sustain that higher level of effectiveness for years (Teddlie & Stringfield, 1993).

Over the past 20 years, developments in educational research have pointed to strategies for making schools more effective for all students. Several teams of researchers and practitioners have struggled to evolve practical, research based, replicable, often content- and structure-specific models for improving the education of students placed at risk. For example, the New American Schools Development Corporation (NASDC) has spearheaded a national effort to develop and implement research-based, proven effective, replicable programs for restructuring schools (for descriptions, see Stringfield, Ross, & Smith, in press). Other recently developed and evaluated programs which show promise include the following: Paideia Schools (Adler, 1982). Accelerated Schools (Levin. 1987), Reading Recovery (Pinnell. 1989). as well as Success for All and the School Development Program.

Implementation Issues

If all of the above programs can "work." it would appear that the solution would be to simply "plug them in." However. a recent summary report form the National Center on Organization and Restructuring of Schools (Newmann & Wehlage. 1995). likened specific innovations to,

> . . . structural tools to be used for specific purposes in particular situations. Hammers. saws, or sandpaper can substantially enhance or diminish the value of the materials to which they are applied. but their effectiveness depends on how they are used in specific contexts. Similarly, the effectiveness of each education restructuring tool, either alone or in combination with others. depends on how well it organized or develops the values. beliefs. and technical skills of educators to improve student learning. (p. 1).

In other words. it is not enough to choose a good school improvement program. educators must implement the program. and the entire school's academic life, with focus and conviction. Stringfield (1992. 1994, 1995). and Rossi and Stringfield (1995) have argued the specific programs, and whole school's academic lives must be implemented with high reliability.

The High/Scope program. Comer School Development program. Success for All. and other designs may each prove valuable in helping some schools improve, but none of the developers claim that their program can "fix" all schools or students. A comparison among multiple sites demonstrates this variability (Stringfield et al.. 1996). In our longitudinal study of Special Strategies for Educating Disadvantaged Children. we evaluated the implementation and impact of ten promising programs. including the School Development Program and Success for All. over three years. We studied four to six sites for each program, with at least two primary sites and multiple replication sites.

Two School Development Program and two Success for All primary sites were evaluated in the Special Strategies study. These schools have student populations in which more than 80 percent of the students received free lunch and more than 90 percent were members of minority groups. In one School Development Program site and one Success for All site. the programs were implemented in a manner consistent with the designers' intent, and maintained over at least three years. Students in these two schools produced achievement scores that substantially exceeded both those of other students in high-poverty schools and those of initially low achieving students in typical schools.

Other sites were not as successful. The School Development Program was never embraced by the principal of the second SDP school. and the district did not actively

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intervene to ensure that the components of the program were working as intended. As a result, major components of the program existed in name only. Similarly, at the second Success for All site, the district's support for the program was as best lukewarm. The principal who had brought the program to the school became a district administrator, and the new principal was selected without being informed that this was a Success for All school. When district-administered test scores for the entire school did not rise in her first year at the school, she dismantled the program for a year. Alternate programs proved ineffective and reading comprehension scores fell. The school partially re-implemented Success for All the next year. Students in both of these schools produced academic achievement gains marginally greater than the national averages for students attending similarly high-poverty schools.

As with the School Development Program, the High/Scope curriculum was more effective in some sites than in others. In a study of 10 High/Scope sites, using waiting-list students as comparison groups, level of implementation was a critical factor in predicting the effectiveness of the program (Frede & Barnett, 1992). Although the teachers were qualified and trained, two of the ten sites used the High/Scope curriculum poorly. Analysis which excluded these two sites found that the preschool children outscored comparison children on a criterion-referenced test. Analysis which included all 10 sites suggested that High/Scope did not affect student learning. Thus, poorly implemented programs can be as ineffective as no program. Worse, poorly implemented programs can be used as evidence by critics that programs to help at-risk students are useless.

The core point in considering the research on program implementation/school improvement/school change is that if efforts are not highly reliable, the probability that the efforts, however well intended, will produce positive results is minimal. As Rossi and Stringfield (1995) have documented, reforms for at-risk students only succeed in relatively high reliability implementation sites.

Ensuring that Programs Work

While there is no guarantee that certain programs will work in every situations, there is ample evidence that no program will work without certain conditions. Three key 'necessary but not sufficient' conditions are professional development, adequate funding and stable, long-term support.

Professional Development

The teacher is the primary mediator between the program as intended and the student's learning experience. For the program to be effective, teachers need to understand and agree to the basic strategies, and have opportunities to practice using new materials and methodologies. Staff development may include initial presentations on the program, initial training, site visits to operating programs, longitudinal technical assistance from the program developer, guidance from an on-site coordinator, inter-school conferences, and implementation checks.

Success for All provides a model of integrated, comprehensive professional development. Program staff, based at Johns Hopkins University, train local school administrators and teachers in instructional strategies and curriculum. When the school first considers adopting Success for All, administrators are encouraged to visit operating programs. Hopkins staff visit the school and discuss the Success for All approach with school staff. Staff are well informed, and make a conscious decision to try Success for All. At least 80 percent of the teachers must vote before implementing the program.

In the spring before a fall implementation, the facilitator and principal attend a three-day meeting in which they learn about the basic components and their roles. Topics include the following: strategies for tutoring, regrouping, faculty peer support, and attendance programs; structural components such as the family support team and building advisory team; and specific programs. Near the same time, Hopkins trainers visit the school to discuss with teachers the program and curriculum and distribute manuals.

In August, staff from Johns Hopkins or experienced trainers or facilitators provide a three-day curriculum training session to teachers. Tutors receive an additional two days of training on assessment and tutoring. The school's on-site facilitator provides inservice sessions, with the assistance of Johns Hopkins trainers for major topics. During the school year, the facilitator coaches teachers with classroom observations or demonstration lessons. Teachers help each other develop skills through peer coaching and grade group meetings. Hopkins staff maintain frequent contact with the school through telephone calls, site visits, and monthly reports. Finally, administrators gather every spring to evaluate the year and plan training for the next year.

Like Success for All, most of the program models discussed in this report include ongoing training and technical assistance from the program developer. Hawthorne provides extensive staff development, including summer sessions, school-year pedagogy classes, and extensive in-class assistance and support. Each year, teachers in the Barclay school who are new to the program are trained by the program facilitator. During the year, the facilitator visits classrooms, providing teachers with feedback and modeling lessons.

Adequate Funding

Educational programs incur more than routine school costs. Many programs targeting at-risk students use special curricula or materials, reduce class size, provide one-on-one tutoring or train teachers in new techniques. These expenses are not negligible. For example, Success for All may cost between $40,000 and $400,000. The level of funding makes a difference for the most at-risk students (Slavin, Madden, Karweit, Dolan, & Wasik, 1992).

Financial support for school programs can be seen as an investment, when the programs provide evidence of effectiveness. The Perry Preschool Program cost $12,346 per child for two years (present value), including both money spent on the program and costs associated with the effects of the program (i.e., college costs as participants were more likely to attend college). Ultimately, however, the program saved each participant $19,569 and saved the general public $76,077. Although this program was much more expensive than the typical public preschool program, programs which economize may not be as effective (Barnett, 1993).

In our three years of fieldwork for the Special Strategies study, we visited several nominated-as-exemplary schools where instructional materials were often scarce and where paint was peeling in classrooms and halls, where teachers told us that on Mondays some students devour their federally subsidized free breakfast because it is their first regular meal since Friday's free lunch, where teachers' cars were parked surrounded by barbed wire and armed guards have been found dead in the stairwells between visits. It was easy for us to understand why Kozol (1991) wrote *Savage Inequalities* and Kotlowitz (1991) concluded that in some urban environments, *There Are No Children Here*.

Stable, Long-Term Support

A school's ability to obtain and sustain sufficient fiscal support is often critical to implementation success (Fullan and Miles, 1992). Some schools receive support from private foundations, businesses, or special district funding to improve low achieving schools. Others rely on federal Chapter 1 funding for targeted programs to assist at-risk students. The importance of adequate, stable funding for such programs can hardly be overstated. The belief that adequate fiscal support would be available is crucial to the process of choosing and implementing a program, and the presence of actual support is crucial during advanced implementation and refinement (Stringfield et al., 1996).

When funding is for a finite period, even for as long as five years, the 'temporary' nature of the project can be used effectively by opponents as 'proof' that the reform will not last. In one memorable school, a veteran teacher opined that, "All of these reforms are alike: Mastery Learning, Madeline Hunter, the Coalition of Essential Schools." Asked how such seemingly diverse strategies resembled each other, the teacher explained, "I was here before the first one arrived and I'll be here after the last is gone." Even five years of guaranteed funding did not dissuade him and his colleagues from believing they could outlast this latest reform effort. In the absence of strong administrative commitment to the principles of the reform, and in the presence of "short-term" (i.e., five-year) funding, the program was effectively 'outlived' by its naysayers (Stringfield et al., 1996). In Special Strategies, when resources were removed as a result of local fiscal programs, or even when resources were repeatedly threatened over several years, the effect was always to permanently hobble or kill that reform effort (Stringfield et al., 1996).

The repeated threat of losing support, or 'shadow disasters,' can be almost as effective as real loss in undermining the viability of a program. For example, one Special

Strategies school chose to implement the Paideia program. For three consecutive years, provisions for funding and a coordinator were not made by the end of the school year. Although financial and personnel support were arranged by the fall, teachers in the school spent the summer questioning the feasibility of the program rather than preparing to use Paideia strategies. The Paideia Program at that school suffered as a result.

A few characteristics were common to Special Strategies sites at which programs were discontinued. In a few cases, there was a school and/or district perception that the program was not living up to its goals, and was discontinued for this reason. Other programs were discontinued in response to political decisions or shifts to popular new programs. When a school or system discontinued one program in favor of another, claiming that the new program was 'more cost effective' without providing strong evidence and without a stable research base on the effectiveness of the new program, observers could hardly be surprised to hear teacher cynicism about the new programs.

At some schools, however, teachers, principals, and parents are able to band together and maintain long-term support for their chosen program. Almost invariably, these more stable schools are led by focused, activist principals (Stringfield et al., 1996). Francis Scott Key is an example of a school which selected a program matched to its needs, and reliably operated that program over a number of years. Consequently, Key sustained a record of seven or eight years of high achievement not typical of comparable schools. External support (i.e., financial assistance, materials, training, and technical assistance) has helped schools maintain some proven programs such as Success for All and the School Development Program in the face of shifting fads, school personnel, and pressure to adopt every popular innovation.

Conditions for Replication

The conditions that we note--professional development, sufficient funding, and stable support--can enable a program to succeed in a single school. However, troubled school districts face a larger problem: what conditions enable a program to succeed in multiple, diverse schools? In the Special Strategies study, we found that schools using externally supported designs generally achieved greater academic gains for their students (Stringfield et al., 1996). Schools often drew unifying strength and focus from their associations with other reform-focused organizations. These organizations can ensure that staff development is available and relevant to both the needs of the school and the premises of the program. They can provide or help schools locate funding. Most importantly, they can help school staff maintain a constant vision of the program and its goals, amid the turmoil and compromise that characterize school reform.

Summary

A variety of replicating studies have indicated that, when provided high quality educational experiences from early grades forward, at-risk students can achieve at levels equal to or exceeding those of other American children. A diverse group of relatively recent school restructuring programs have demonstrated their ability to help disadvantaged students achieve.

However, if a patient pays for medicine and then leaves it on the shelf, or if a person buys exercise equipment and never takes it out of its box, neither the unused medicine nor the unused exercise equipment will contribute to the intended good purpose. In exactly the same way, the choice of a more effective school improvement strategy will make no contribution to improving the academic achievements of at-risk students if the program is not reliably implemented. Therefore, we have summarized not only programs that can work, but critical conditions that must be met for the more effective programs to work.

The failure of at-risk students is not inevitable. Studies of several promising programs reviewed in this testimony indicate that, where potentially effective school restructuring programs are well implemented over several years, minority students' academic achievements rise, and often rise dramatically. The problem of clearly inadequate achievements for Philadelphia's young African American students is real: and practical, real-world remedies exist for addressing that problem. Those remedies will require stable support and funding.

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Overview of the Prince George's County Public School System

Department of Legislative Services
Office of Policy Analysis

Annapolis, Maryland

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Overview of the Prince George's County Public School System

Enrollment and Demographic Trends

- The Prince George's County Public School System is the largest in Maryland, serving over 122,000 students (K-12) or 15.3% of all students enrolled in public schools statewide.
- Prince George's County has the second highest concentration of minority students (83.3%) in the State. Baltimore City, at 86.6%, has the highest concentration. **Exhibit 1** shows the racial composition of the five largest school systems in the State.

Exhibit 1
Racial Composition of the State's Five Largest School Systems

County	African American	American Indian*	Asian/Pacific Islander	Hispanic	White
Prince George's	73.4%	0.4%	3.8%	5.7%	16.7%
Anne Arundel	18.1%	0.2%	2.2%	1.6%	77.9%
Baltimore City	85.1%	0.5%	0.6%	0.4%	13.4%
Baltimore	26.5%	0.2%	3.4%	1.2%	68.7%
Montgomery	19.8%	0.4%	12.6%	12.5%	54.7%
Statewide Average	35.6%	0.3%	3.9%	3.5%	56.7%

*Includes Alaskan Natives

- Approximately 32% of African American students statewide, 25% of Hispanic students, and 15% of Asian students are enrolled in Prince George's County Public Schools. Only Baltimore City serves more African-American students than Prince George's County and only Montgomery County serves more Asian and Hispanic students.

- As illustrated in **Exhibit 2**, Prince George's County serves a higher proportion of limited English proficient students and students qualifying for free and reduced price meals than the statewide average. However, they serve a smaller percentage of special education students.

Exhibit 2
Selected Student Population Characteristics
(1995-1996 School Year)

	Enrollment	% Special Education Students	% Limited English Proficient Students	% Approved for Free/Reduced Meals
Allegany	11,300	13.4	0.0	44.6
Anne Arundel	71,383	12.8	0.6	15.2
Baltimore City	109,980	15.1	0.4	70.1
Baltimore	101,564	11.9	1.3	25.1
Calvert	13,496	11.3	0.1	14.2
Caroline	5,521	14.6	1.0	40.1
Carroll	25,408	12.9	0.3	8.8
Cecil	14,640	15.0	0.2	21.4
Charles	20,966	11.9	0.4	22.6
Dorchester	5,216	13.3	0.6	44.1
Frederick	32,766	12.3	0.4	14.2
Garrett	5,190	13.4	0.0	43.4
Harford	36,820	12.0	0.3	17.3
Howard	37,547	10.8	2.0	9.1
Kent	2,863	11.8	1.5	34.8
Montgomery	120,291	10.6	5.9	21.4
Prince George's	122,415	9.1	3.1	41.2
Queen Anne's	6,271	12.5	0.4	19.5
St. Mary's	13,950	13.3	0.4	27.0
Somerset	3,277	11.7	1.0	53.5
Talbot	4,427	12.6	0.8	25.9
Washington	19,824	14.3	0.9	30.0
Wicomico	13,796	11.3	1.3	33.5
Worcester	6,633	10.4	0.7	35.5
Statewide	805,544	12.0	1.9	31.0

Source: Maryland State Department of Education, 1996 Maryland School Performance Report

Historical Enrollment Trends

- Student enrollment in Prince George's County decreased by over 50,000 students or by 33% between 1973 and 1986. However, in 1987 student enrollment began to increase.

- Over the next ten years, student enrollment increased by approximately 18%. Even with a gain of 18,000 students, Prince George's County is still educating fewer students than it did 25 years ago. Overall, public school student enrollment decreased by 22% between 1973 and 1996.

- During this same period (1973-1996), enrollment in non-public schools in Prince George's County decreased by around seven percent.

Enrollment Projections

- Based on projection by the Maryland Office of Planning, student enrollment in Prince George's County will grow at a rate slightly above the statewide average as illustrated below in **Exhibit 3**.

Exhibit 3
Student Enrollment Projections (K-12)

	1997	1998	1999	2000	2001	2002
Prince George's Co.	125,000	126,610	127,970	128,920	129,310	129,630
% change	2.1%	1.3%	1.1%	0.7%	0.3%	0.2%
Statewide	813,770	823,820	831,350	836,070	838,660	839,190
% change	1.9%	1.2%	0.9%	0.6%	0.3%	0.1%

- Over the next five years, student enrollment in Prince George's County will increase by 3.7% for a gain of 4,630 students. **Exhibits 4 and 5** show enrollment projections for all of Maryland's school systems.

- These projections indicate that while student enrollment is increasing in Prince George's County, other school systems, especially in the outer suburbs will grow at a much faster rate. This is evident in the case of Howard County where the school system is projected to gain more students over the next five years than Prince George's County, even though the Prince George's County School System is three times larger.

Exhibit 4
Student Enrollment Projections

County	1997	1998	1999	2000	2001	2002
Allegany	10,970	10,950	10,820	10,710	10,610	10,520
Anne Arundel	72,490	73,320	73,980	74,480	74,820	74,830
Baltimore City	103,370	101,810	99,830	97,870	95,460	93,100
Baltimore	102,910	104,410	105,200	105,930	106,320	106,140
Calvert	14,480	14,940	15,270	15,610	15,950	16,260
Caroline	5,550	5,600	5,660	5,650	5,680	5,700
Carroll	26,520	26,830	27,150	27,260	27,470	27,600
Cecil	14920	15,100	15,250	15,400	15,530	15,590
Charles	21,000	21,290	21,440	21,420	21,430	21,530
Dorchester	5,060	5,040	5,000	4,900	4,850	4,810
Frederick	34,280	35,260	36,130	36,880	37,630	38,180
Garrett	5,050	5,060	5,050	5,000	4,990	4,960
Harford	37,790	38,520	39,160	39,600	39,930	40,100
Howard	40,220	41,770	43,050	44,230	45,130	45,800
Kent	2,830	2,900	2,940	2,940	2,920	2,880
Montgomery	123,050	125,430	127,860	129,650	131,120	132,160
Prince George's	125,000	126,610	127,970	128,920	129,310	129,630
Queen Anne's	6,280	6,320	6,350	6,400	6,400	6,420
St. Mary's	14,220	14,490	14,740	14,680	14,690	14,670
Somerset	3,040	3,030	3,030	3,020	3,000	2,980
Talbot	4,370	4,370	4,330	4,350	4,300	4,280
Washington	19,740	19,910	20,050	20,090	20,070	19,980
Wicomico	13,870	13,980	14,090	14,080	14,050	14,050
Worcester	6,760	6,880	7,000	7,000	7,000	7,020
Total	813,770	823,820	831,350	836,070	838,660	839,190

Source: Public School Enrollment Projections, Maryland Office of Planning, August 1997

Exhibit 5
Projected Change In Student Enrollment

County	1997	1998	1999	2000	2001	2002
Allegany	0.0%	-0.2%	-1.2%	-1.0%	-0.9%	-0.8%
Anne Arundel	1.5%	1.1%	0.9%	0.7%	0.5%	0.0%
Baltimore City	-0.6%	-1.5%	-1.9%	-2.0%	-2.5%	-2.5%
Baltimore	1.9%	1.5%	0.8%	0.7%	0.4%	-0.2%
Calvert	4.0%	3.2%	2.2%	2.2%	2.2%	1.9%
Caroline	2.5%	0.9%	1.1%	-0.2%	0.5%	0.4%
Carroll	2.0%	1.2%	1.2%	0.4%	0.8%	0.5%
Cecil	3.8%	1.0%	1.0%	0.8%	0.4%	0.6%
Charles	1.2%	1.4%	0.7%	-0.1%	0.0%	0.5%
Dorchester	1.1%	-0.4%	-0.8%	-2.0%	-1.0%	-0.8%
Frederick	3.4%	2.9%	2.5%	2.1%	2.0%	1.5%
Garrett	-0.1%	0.2%	-0.2%	-1.0%	-0.2%	-0.6%
Harford	2.3%	1.9%	1.7%	1.1%	0.8%	0.4%
Howard	4.1%	3.9%	3.1%	2.7%	2.0%	1.5%
Kent	3.1%	2.5%	1.4%	0.0%	-0.7%	-1.4%
Montgomery	2.6%	1.9%	1.9%	1.4%	1.1%	0.8%
Prince George's	2.1%	1.3%	1.1%	0.7%	0.3%	0.2%
Queen Anne's	1.7%	0.6%	0.5%	0.8%	0.0%	0.3%
St. Mary's	3.1%	1.9%	1.7%	-0.4%	0.1%	-0.1%
Somerset	0.1%	-0.3%	0.0%	-0.3%	-0.7%	-0.7%
Talbot	0.9%	0.0%	-0.9%	0.5%	-1.1%	-0.5%
Washington	1.4%	0.9%	0.7%	0.2%	-0.1%	-0.4%
Wicomico	1.4%	0.8%	0.8%	-0.1%	-0.2%	0.0%
Worcester	2.0%	1.8%	1.7%	0.0%	0.0%	0.3%
Total	1.9%	1.2%	0.9%	0.6%	0.3%	0.1%

Source: Public School Enrollment Projections, Maryland Office of Planning, August 1997

State Education Aid

- State primary and secondary education aid totals $2.4 billion in fiscal 1998, representing over 30 percent of the State's general fund revenues. Prince George's County's share of this aid totals $396 million. This includes $331.7 million in direct aid and $64.7 million in teachers' retirement payments on behalf of the county school system. **Exhibit 6** shows the amount of State education aid provided to Prince George's County by program.

Exhibit 6
State Education Aid for Prince George's County

Program	FY 1997	FY 1998	Difference	% Difference
Current Expense Aid	$231,202,651	$253,168,827	$21,966,176	9.5%
Compensatory Aid	5,552,934	5,976,997	424,063	7.6%
Transportation Aid	16,221,258	17,134,737	913,479	5.6%
Special Education Aid	26,038,984	28,118,597	2,079,613	8.0%
LEP Grants	1,611,000	1,925,500	314,500	19.5%
Targeted Poverty	1,616,906	7,739,760	6,122,854	379%
Magnet	13,000,000	14,100,000	1,100,000	8.5%
Extended Elementary	1,303,774	1,303,774	0	0%
Other Aid	3,598,864	2,261,717	(1,337,147)	(37.1%)
Teacher's Retirement	65,316,931	64,740,824	(576,107)	(1.0%)
Total	$365,463,302	$396,470,733	$31,007,431	8.5%

- **Appendix 1a - 1f** show the amount of State education aid provided to all local school districts. As indicated in **Appendix 1f**, per pupil State operating education aid for Prince George's County has been above the State average for the last five years. In fiscal 1998, Prince George's County ranked 10th in the amount of per pupil operating education aid received from the State.

- Prince George's County received approximately 17 percent of total State education aid in fiscal 1998. Historically, Prince George's County has always received around 16 to 17 percent of the State education aid.

- In fiscal 1996, the State contributed 40 percent of total education funding, with local governments providing 56 percent. The federal share consisted of only 4 percent. In Prince George's County, the State share was slightly higher at 45 percent of total funding; whereas the county and federal share totaled 52 percent and 3 percent respectively.

- **Appendix 2a -2b** show State public school construction funding for each school district for fiscal years 1994 through fiscal 1998.

- As indicated in the Appendix 2b, Prince George's County has received the 4th smallest amount of State school construction aid over the last five years as measured on a per pupil basis. In total dollars, however, Prince George's County has received the third highest amount at approximately $56 million, which represents around 9% of total State school construction funding over the last five years.

Per Pupil Expenditures

- Per pupil school expenditures totaled $6,530 statewide in fiscal 1996, a 2 percent increase from the prior year. Prince George's County's per pupil expenditure totaled $6,287, the 9th highest in the State. **Exhibit 7** shows the per pupil expenditure for each school district.

- The per pupil expenditure in Prince George's County is $243 below the statewide average and $1,690 below the highest spending district (Montgomery County).

- Of the State's five largest school systems, Prince George's County had the 2nd lowest per pupil expenditure.

- As indicated in Exhibit 7, during the last ten years, per pupil expenditures in Prince George's County have increased by 1.4 percent annually, slightly below the statewide average of 1.8 percent.

Exhibit 7
Education Expenditures Per Pupil

County	FY 1986	FY 1991	Average Annual Growth	FY 1996	Average Annual Growth
Allegany	$3,439	$4,866	7.2%	$5,936	4.1%
Anne Arundel	3,872	5,941	8.9%	6,464	1.7%
Baltimore City	3,486	5,178	8.2%	6,208	3.7%
Baltimore	4,622	6,295	6.4%	6,594	0.9%
Calvert	3,974	5,294	5.9%	6,056	2.7%
Caroline	3,132	4,598	8.0%	5,448	3.5%
Carroll	3,305	5,169	9.4%	6,094	3.3%
Cecil	3,351	5,066	8.6%	5,819	2.8%
Charles	3,535	5,299	8.4%	6,076	2.8%
Dorchester	3,784	5,457	7.6%	6,111	2.3%
Frederick	3,515	5,378	8.9%	5,970	2.1%
Garrett	3,357	5,176	9.0%	5,850	2.5%
Harford	3,456	4,981	7.6%	5,875	3.4%
Howard	4,503	7,003	9.2%	7,162	0.5%
Kent	4,056	6,100	8.5%	6,926	2.6%
Montgomery	5,407	7,807	7.6%	7,977	0.4%
Prince George's	4,004	5,878	8.0%	6,287	1.4%
Queen Anne's	3,901	5,515	7.2%	6,178	2.3%
St. Mary's	3,751	5,379	7.5%	5,989	2.2%
Somerset	3,439	5,296	9.0%	6,773	5.0%
Talbot	3,798	5,445	7.5%	6,309	3.0%
Washington	3,793	5,291	6.9%	5,801	1.9%
Wicomico	3,410	5,024	8.1%	5,641	2.3%
Worcester	4,301	6,089	7.2%	6,487	1.3%
Statewide	**4,064**	**5,961**	**8.0%**	**6,530**	**1.8%**

Note: Amounts do not include expenditures for debt service, construction, food service, and nonpublic special education placements. September 30th enrollment used to calculate per students amounts. Prekindergarten and kindergarten students counted as one-half time if in half-day programs.

Source: Selected Financial Data, Maryland Public Schools, Part II Expenditures, selected years ; Department of Legislative Services.

Date: May 28, 1997

Teacher Salaries

- The average teacher's salary in Maryland for 1996 totaled $41,186 , ranging from $34,160 in Garrett County to $48,256 in Montgomery County. Prince George's County ranked 5th at $41,325.
- Prince George's County had the 4th highest starting teacher salary at $27,144. Starting salaries ranged from $23,567 in Garrett County to $29,512 in Montgomery County.
- Prince George's County also had the 4th highest salary amount for teachers at the Master's Degree Step 10 level ($39,999).
- **Exhibit 8** shows selected teacher salary information for each local school district and **Exhibit 9** shows selective salary information for non-teaching professional staff.

Teacher-Student Ratios

- **Exhibit 10** shows the teacher-student ratios for each school district. Teacher-student ratios in Prince George's County exceed the state average for both elementary and high schools; however, the county is slightly below the state average for middle schools.
- Prince George's County has the 18th lowest teacher-student ratios for elementary and high schools and the 11th lowest ratio for middle schools.

Local Support for Education Programs

- Local education effort measures the extent to which a local government utilizes its revenue base to fund education programs. Specifically, local effort is calculated by dividing local education appropriation by wealth, which for education purposes in Maryland includes assessable base and net taxable income, and indexing the results to the state average.
- As shown in **Exhibit 11**, Prince George's County has the third highest education effort in the State at 102% of the state average. Only Howard and Montgomery counties put forth a higher effort to fund educational programs.
- Several factors affecting education effort include: the relative wealth of a jurisdiction, the demand for education services, special needs of a school district, and competing demands for other government services.

Exhibit 8
Selective Teacher Salary Information

County	Average Teacher's Salary - 1996	% of State Average	Starting Teacher's Salary - 1997	Mid-Career Teacher's Salary -1997
Allegany	$37,510	91.1%	$23,729	$35,624
Anne Arundel	42,547	103.3%	25,827	40,059
Baltimore City	40,212	97.6%	24,684	33,649
Baltimore	39,901	96.9%	26,500	38,160
Calvert	43,275	105.1%	26,867	44,402
Caroline	36,971	89.8%	26,910	36,693
Carroll	39,819	96.7%	25,537	37,718
Cecil	37,570	91.2%	26,282	34,532
Charles	41,119	99.8%	27,430	38,590
Dorchester	37,654	91.4%	25,307	34,366
Frederick	38,289	93.0%	26,276	37,718
Garrett	34,160	82.9%	23,567	33,847
Harford	36,470	88.5%	26,862	36,786
Howard	41,335	100.4%	26,915	39,328
Kent	38,898	94.4%	25,798	36,612
Montgomery	48,256	117.2%	29,512	45,157
Prince George's	41,325	100.3%	27,144	39,999
Queen Anne's	37,544	91.2%	26,718	35,740
St. Mary's	39,338	95.5%	28,003	37,124
Somerset	35,493	86.2%	25,621	34,421
Talbot	35,974	87.3%	26,500	36,100
Washington	37,454	90.9%	25,075	33,235
Wicomico	35,998	87.4%	25,760	35,030
Worcester	38,224	92.8%	26,849	36,740
Total	$41,186	100.0%	N/A	N/A

Note: Starting teacher's salary defined as bachelor's degree - step 1.

Mid-careet teacher's salary defined as master's degree - step 10.

Source: Maryland State Department of Education

Exhibit 9
Selective Salary Information for Central Office Staff

County	Average Superintendent Salary - 1996	Average Principal Salary - 1996	Average Vice Principal Salary -1996	Average Librarian Salary -1996	Average Guidance Counselor Salary - 1996
Allegany	$91,052	$54,478	$45,576	$39,346	$38,808
Anne Arundel	101,721	75,604	67,589	44,793	54,407
Baltimore City	140,000	65,612	55,665	43,847	45,836
Baltimore	121,000	67,790	61,840	44,000	46,516
Calvert	99,000	77,843	64,287	47,118	50,549
Caroline	94,209	61,888	50,537	40,583	44,381
Carroll	125,454	69,044	59,272	42,299	42,119
Cecil	100,025	62,844	52,122	37,921	41,774
Charles	95,000	64,662	50,821	46,350	47,335
Dorchester	85,000	61,460	48,844	47,492	40,777
Frederick	96,000	65,640	57,003	41,304	44,991
Garrett	76,370	52,376	46,042	37,472	35,831
Harford	105,000	64,002	58,093	41,203	42,132
Howard	121,740	75,701	60,098	45,101	46,246
Kent	80,494	62,251	56,096	47,213	43,320
Montgomery	145,320	81,963	73,651	53,157	54,235
Prince George's	125,000	72,984	65,383	42,724	44,823
Queen Anne's	96,700	65,121	55,711	39,340	42,058
St. Mary's	91,616	64,000	53,794	46,788	40,956
Somerset	78,750	46,836	51,885	36,815	45,500
Talbot	86,356	60,549	45,178	42,008	41,221
Washington	90,200	63,177	53,232	36,967	34,735
Wicomico	101,500	62,087	53,142	42,090	42,671
Worcester	90,000	67,121	57,090	41,841	45,748
Total	$101,848	$69,974	$60,609	$44,850	$47,181

Source: Maryland State Department of Education

Exhibit 10
1996-1997 Teacher-Student Ratios
BY Type of School

County	Elementary Teacher Student Ratio	Middle Teacher Student Ratio	High School Teacher Student Ratio	Other Schools Teacher Student Ratio
Allegany	17.5	15.9	16.7	13.0
Anne Arundel	19.7	19.3	19.0	6.6
Baltimore City	19.5	16.3	16.8	16.4
Baltimore	17.9	15.2	15.8	4.9
Calvert	20.7	20.1	21.3	6.6
Caroline	18.7	18.4	20.2	16.3
Carroll	20.2	17.6	19.1	7.4
Cecil	18.2	17.7	17.0	N/A
Charles	19.7	19.3	18.2	2.4
Dorchester	18.1	19.1	16.3	22.3
Frederick	18.4	16.2	17.7	7.4
Garrett	13.9	14.7	14.0	12.3
Harford	18.2	16.1	16.3	3.0
Howard	16.9	14.5	17.0	3.2
Kent	16.9	N/A	15.3	15.9
Montgomery	18.6	16.2	17.7	6.8
Prince George's	19.4	16.3	17.9	12.8
Queen Anne's	18.3	17.6	16.4	16.2
St. Mary's	17.7	15.4	20.0	11.0
Somerset	18.2	13.3	14.4	N/A
Talbot	19.7	16.3	15.6	N/A
Washington	17.8	16.3	16.7	10.6
Wicomico	17.6	14.5	16.2	14.9
Worcester	18.7	17.8	16.8	13.7
Total	18.7	16.4	17.3	13.5

Source: MSDE Grade Organization Maryland Public Schools - September 30, 1996
Prepared by: Office of Policy Analysis - September, 1997.

Exhibit 11

Education Effort Index
FY 1994

County	1994 County Assessable Base (in thousands)	1993 Net Taxable Income (in thousands)	Total Wealth Base (in thousands)	FY 94 Local Education Appropriation (in thousands)	Education Effort	Effort Index
Allegany	$1,188,740	$535,888	$1,724,628	$19,250	0.0112	0.77
Anne Arundel	12,160,628	5,793,199	17,953,827	238,107	0.0133	0.92
Baltimore City	8,455,680	4,664,945	13,120,625	190,191	0.0145	1.00
Baltimore	15,716,618	9,339,775	25,056,393	366,443	0.0146	1.01
Calvert	2,288,069	750,099	3,038,168	39,504	0.0130	0.90
Caroline	417,933	209,467	627,400	8,912	0.0142	0.98
Carroll	2,862,147	1,598,889	4,461,036	64,560	0.0145	1.00
Cecil	1,520,381	733,465	2,253,846	32,165	0.0143	0.98
Charles	2,548,842	1,189,990	3,738,832	54,068	0.0145	1.00
Dorchester	597,547	226,196	823,743	9,832	0.0119	0.82
Frederick	3,784,885	1,991,398	5,776,283	84,043	0.0145	1.00
Garrett	666,194	187,791	853,985	10,432	0.0122	0.84
Harford	3,784,721	2,325,517	6,110,238	87,500	0.0143	0.99
Howard	6,270,231	3,479,142	9,749,373	151,842	0.0156	1.07
Kent	467,429	173,823	641,252	9,033	0.0141	0.97
Montgomery	29,483,670	13,793,018	43,276,688	666,176	0.0154	1.06
Prince George`s	15,766,295	7,784,978	23,551,273	349,164	0.0148	1.02
Queen Anne's	962,074	377,504	1,339,578	18,530	0.0138	0.95
St. Mary's	1,537,470	713,370	2,250,840	32,329	0.0144	0.99
Somerset	267,876	119,813	387,689	5,539	0.0143	0.99
Talbot	1,178,942	389,311	1,568,253	16,807	0.0107	0.74
Washington	2,069,667	1,085,899	3,155,566	43,223	0.0137	0.95
Wicomico	1,389,734	706,024	2,095,758	27,313	0.0130	0.90
Worcester	2,247,755	384,057	2,631,812	28,708	0.0109	0.75
Total	$117,633,528	$58,553,558	$176,187,086	$2,553,673	0.0145	1.00

Prepared by the Department of Legislative Services

- As shown in **Exhibit 12**, expenditures for primary and secondary education in Prince George's County in fiscal 1995 accounted for less than 40% of spending from own source revenues, the second lowest in the state.

- While education effort measures how a local government uses their own tax bases to fund education programs, tax effort compares the extent to which local governments tax available resources to fund all government services. It is important to note that a county could have an above average tax effort but still make a lower education effort. This difference is illustrated in **Exhibit 13**.

- As indicated in Exhibit 13, Prince George's County has the second highest tax effort in the State at 126% of the state average. Only Baltimore City has a higher tax effort.

Exhibit 12

COUNTY SPENDING FROM OWN-SOURCE REVENUES (EXCLUDES ENTERPRISE FUNDS)
AS A % OF TOTAL
FY 1995 ADOPTED BUDGETS

	General Gov't	Public Safety	Public Works	Health & Human Services	Board of Education	Community Colleges	Recreation & Natural Resources	Debt Service	Other	Reserves	Total
Allegany	8.2%	9.7%	8.1%	4.0%	44.5%	7.8%	0.8%	10.4%	6.6% #	0.0%	100.0%
Anne Arundel	8.1%	19.1%	5.3%	3.7%	50.2%	2.3%	1.6%	6.0%	3.1%	0.5%	100.0%
Baltimore City	10.2%	34.1%	6.0%	1.3%	23.9%	0.0%	4.9%	7.3%	12.1% #	0.1%	100.0%
Baltimore	6.1%	16.2%	3.7%	2.0%	47.4%	3.6%	1.8%	8.3%	10.5% #	0.3%	100.0%
Calvert	7.4%	10.9%	2.5%	3.8%	49.1%	0.8%	3.6%	7.3%	14.6% #	0.0%	100.0%
Caroline	10.2%	12.8%	0.3%	2.7%	49.9%	2.6%	2.0%	7.6%	12.0% #	0.0%	100.0%
Carroll	11.8%	7.4%	0.6%	3.2%	53.4%	1.8%	2.0%	8.1%	10.6% #	1.2%	100.0%
Cecil	8.5%	13.2%	3.8%	2.8%	54.0%	6.2%	1.0%	7.1%	2.9%	0.5%	100.0%
Charles	10.0%	18.7%	1.5%	2.7%	52.6%	4.2%	1.3%	6.6%	1.9%	0.5%	100.0%
Dorchester	8.1%	12.1%	15.8%	2.1%	40.9%	2.5%	1.9%	7.3%	9.4% #	0.0%	100.0%
Frederick	8.6%	9.8%	0.8%	5.1%	53.0%	3.1%	1.9%	5.1%	12.0%	0.6%	100.0%
Garrett	8.4%	5.3%	24.4%	1.4%	49.8%	5.5%	-0.7%	0.1%	5.8% #	0.0%	100.0%
Harford	11.9%	11.4%	8.3%	2.1%	49.7%	3.6%	1.7%	4.2%	7.0%	0.2%	100.0%
Howard	9.2%	13.8%	2.8%	2.5%	48.4%	2.7%	5.1%	11.4%	3.1%	1.1%	100.0%
Kent	8.9%	12.3%	3.3%	2.9%	55.7%	1.8%	3.8%	1.3%	10.1% #	0.0%	100.0%
Montgomery	6.1%	12.0%	1.8%	4.3%	47.4%	2.3%	5.7%	9.2%	7.7% #	3.5%	100.0%
Prince George's (1) (a)	8.6%	15.8%	2.1%	2.5%	39.9%	1.2%	7.3%	7.7%	11.0% #	3.9%	100.0%
Queen Anne's	7.6%	12.0%	7.8%	3.7%	52.2%	1.8%	4.2%	4.8%	5.7%	0.2%	100.0%
St. Mary's	10.7%	14.5%	0.9%	2.8%	51.8%	1.3%	2.3%	8.4%	7.1% #	0.2%	100.0%
Somerset	13.8%	10.4%	14.3%	2.8%	44.9%	0.8%	3.7%	1.6%	7.6% #	0.0%	100.0%
Talbot	5.3%	8.6%	1.2%	3.8%	60.6%	2.1%	6.1%	3.1%	7.0% #	2.1%	100.0%
Washington	8.2%	9.2%	0.1%	3.6%	55.0%	4.3%	1.9%	8.8%	9.0% #	0.0%	100.0%
Wicomico	5.7%	15.2%	1.5%	3.4%	48.0%	2.0%	2.7%	11.9%	7.2% #	2.4%	100.0%
Worcester	6.2%	9.7%	3.3%	3.6%	60.7%	0.9%	1.7%	3.0%	10.9% #	0.0%	100.0%
Total	8.0%	16.6%	3.4%	3.0%	44.4%	2.2%	4.2%	7.9%	8.6%	1.7%	100.0%

(a) For comparability purposes, the county's stormwater management enterprise fund was included.

# Indicates these counties lump-sum their fringe benefit costs. These costs are shown in the "other" category. Fringe benefit costs for the Garrett County Roads Board are included under "public works"; all other fringe benefit costs for non-roads board employees are included in the "other" category.

"Other" includes county appropriations to a library board, urban development and housing, economic development, economic opportunity, transfers to capital and enterprise funds, and miscellaneous expenditures.

Notes:

(1) The M-NCPPC accounts for approximately 52% of the county's reserves.
(2) Service charges and other revenues, and an equivalent amount of expenditures, related to sewer and water operations, solid waste operations, parking garage operations, and transit services that are accounted for in a general fund or special revenue fund were excluded from the figures.

Source: County Budgets

Prepared by the Department of Fiscal Services, August 15, 1995

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Exhibit 13
Local Wealth and Education Effort
FY 1994

	Education Effort	Tax Effort
Allegany	0.77	0.98
Anne Arundel	0.92	0.84
Baltimore City	1.00	1.62
Baltimore	1.01	0.96
Calvert	0.90	0.68
Caroline	0.98	0.81
Carroll	1.00	0.78
Cecil	0.98	0.82
Charles	1.00	0.86
Dorchester	0.82	0.87
Frederick	1.00	0.84
Garrett	0.84	0.71
Harford	0.99	0.88
Howard	1.07	0.88
Kent	0.97	0.78
Montgomery	1.06	0.98
Prince George`s	1.02	1.26
Queen Anne's	0.95	0.74
St. Mary's	0.99	0.78
Somerset	0.99	0.91
Talbot	0.74	0.49
Washington	0.95	0.88
Wicomico	0.90	0.86
Worcester	0.75	0.74
State Average	1.00	1.00

Prepared by the Department of Legislative Services

Tax Limitation Provision

- A charter amendment imposed in 1978 and amended in 1984 limits the Prince George's County's general property tax rate to $2.40 for each $100 of assessed value. However, Prince George's County levies several special property taxes that are not affected by the tax limitation measure. **Exhibit 14** shows the total county property tax rate levied on most residents in the county.

- Approximately 25% of Prince George's County property tax rate goes for non-general funded programs.

Exhibit 14
Prince George's County Property Tax Rates

	FY 1994	FY 1995	FY 1996	FY 1997	FY 1998
General Tax Rate	$2.400	2.400	2.400	2.400	2.400
Pre-Trim Debt Service	.065	.038	.033	.026	.021
MNCPPC[1]	.610	.610	.610	.610	.610
Storm Water	.135	.135	.135	.135	.135
WSTC[2]	.065	.065	.065	.065	.065
Total Tax Rate	3.262	3.248	3.243	3.236	3.231

[1] Maryland National Capital Parks and Planning Commission (MNCPPC)
[2] Washington Suburban Transit Commission

Source: Department of Fiscal Services Annual Property Tax Survey

Student Transportation Costs

- Prince George's County student transportation expenditures in fiscal 1995 totaled $54.9 million or $650 per pupil, which is approximately one-third greater than the statewide average of $484. Only two school systems (Baltimore City at $920 and Montgomery County $655) spent more per student on student transportation services than Prince George's County.

- The higher per student costs in Prince George's County can be attributable to (1) a larger number of disabled students receiving special education transportation services; (2) students attending schools outside their regular attendance area; and (3) lower student occupancy rate on school buses serving magnet schools.

- Prince George's County transports a higher concentration of disabled students than all other school systems except Baltimore City and Montgomery County. In fiscal 1995, approximately 6% of students transported received special transportation services compared to the statewide average of 1.5% of students statewide. (The statewide average excludes students receiving special transportation in Baltimore City, Montgomery County, and Prince George's County, since those school systems would skew the average).

- As illustrated in **Exhibit 15**, transporting disabled students is at least 10 times more expensive than transporting regular students. These higher costs are primarily due to fewer students being transported per vehicle and the need for additional personnel on each vehicle to assist with disabled students. These cost differences are clearly evident in Prince George's County. For example, while disabled students comprise less than 6% of the total number of students transported in Prince George's County, they are responsible for over 34% of school transportation expenditures.

- In fiscal 1996, approximately 25% of students transported in Prince George's County attended schools outside their regular attendance area, of which 11,332 (54.5%) were transported for desegregation purposes and 9,437 (45.5%) to attend magnet schools.

- As illustrated in **Exhibit 16**, transportation costs are higher for students participating in the county's magnet school program. This is partly attributable to 1) a longer average ride time for magnet students, and 2) a lower occupancy rate on buses serving magnet students.

Exhibit 15
Per Student Transportation Costs - Fiscal 1995

County	Per Student Cost - Regular Program	Per Student Cost - Special Program	Per Student Cost - Total Program
Prince George's	$370	$3,877	$650

Exhibit 16
Regular Student Transportation Costs - Fiscal 1996

Program	Students Transported	Transportation Costs	Cost Per Student
Magnet School Students	9,437	$6,266,952	$664
Desegregation	11,332	$24,229,872	$331
Other Regular	61,877		
Total Students Transported	82,646	$30,496,824	$369

- The average ride time for magnet students is 54 minutes compared to 22 minutes for non-magnet students. (The average ride time is based on the pickup time for the first student on the route until the bus arrives at its destination). In addition, the average magnet bus delivers almost 20 students per trip compared to 35 students per trip for non-magnet buses. Both of these factors may explain why the average transportation cost for magnet school students is twice the cost for transporting non-magnet school students.

- Prince George's County does not report the costs associated with transporting students for desegregation purposes. However, assuming these costs are similar to the per student transportation costs for magnet school students, the cost for transporting students for desegregation purposes may total between $5.6 million ($500 per student) and $7.5 million ($664 per student). If these students had to attend school in their regular attendance area, student transportation costs may be reduced to approximately $3.4 million or $300 per student. Accordingly, Prince George's County could realize an annual cost savings of around $2.2 million and $4.1 million if students attended schools in their regular attendance area.

Appendix 1a
State Operating Education Aid - Fiscal 1994
Actual Aid

	Direct Education Aid	Teacher's Retirement Costs	Total Education Aid	Per Pupil Aid
Allegany	$29,917,650	$4,489,550	$34,407,200	$3,198
Anne Arundel	121,039,370	32,516,383	153,555,753	2,328
Baltimore City	350,105,100	44,378,599	394,483,699	3,660
Baltimore	146,168,705	45,352,343	191,521,048	2,095
Calvert	21,421,180	5,414,514	26,835,694	2,294
Caroline	13,835,511	2,136,960	15,972,471	3,121
Carroll	50,425,057	10,001,085	60,426,142	2,665
Cecil	31,957,695	5,834,005	37,791,700	2,877
Charles	45,655,048	8,890,195	54,545,243	2,834
Dorchester	13,556,428	2,187,232	15,743,660	3,224
Frederick	61,431,108	12,914,867	74,345,975	2,560
Garrett	14,418,628	2,195,083	16,613,711	3,247
Harford	74,656,800	14,286,352	88,943,152	2,697
Howard	50,381,722	17,439,187	67,820,909	2,051
Kent	5,318,579	1,283,107	6,601,686	2,592
Montgomery	82,803,690	66,883,699	149,687,389	1,384
Prince George's	253,205,819	52,884,615	306,090,434	2,729
Queen Anne's	11,161,883	2,642,439	13,804,322	2,488
St. Mary's	31,121,539	5,667,093	36,788,632	2,987
Somerset	10,121,149	1,541,150	11,662,299	3,450
Talbot	3,899,355	1,897,138	5,796,493	1,419
Washington	44,816,381	8,325,261	53,141,642	2,919
Wicomico	32,252,123	5,849,237	38,101,360	2,960
Worcester	3,776,131	3,076,750	6,852,881	1,163
Statewide	$1,503,446,651	$358,086,844	$1,861,533,495	$2,522

Note: September 30th enrollment used to calculate per student amounts. Prekindergarte and kindergarten students counted as one-half time if in half-day programs.

Prepared by the Department of Fiscal Services, May 1997

Appendix 1b
State Operating Education Aid - Fiscal 1995
Actual Aid

	Direct Education Aid	Teacher's Retirement Costs	Total Education Aid	Per Pupil Aid
Allegany	$31,875,946	$4,958,251	$36,834,197	$3,401
Anne Arundel	123,970,618	36,123,617	160,094,235	2,376
Baltimore City	350,783,268	47,646,953	398,430,221	3,689
Baltimore	160,462,219	50,280,136	210,742,355	2,209
Calvert	23,221,600	6,003,525	29,225,125	2,395
Caroline	15,553,855	2,374,305	17,928,160	3,397
Carroll	52,748,674	11,073,694	63,822,368	2,729
Cecil	33,402,300	6,517,925	39,920,225	2,954
Charles	46,607,173	9,718,706	56,325,879	2,875
Dorchester	14,448,840	2,413,327	16,862,167	3,457
Frederick	64,682,001	14,624,673	79,306,674	2,627
Garrett	14,572,770	2,424,986	16,997,756	3,330
Harford	78,315,263	16,243,895	94,559,158	2,772
Howard	53,598,672	19,791,746	73,390,418	2,112
Kent	5,462,202	1,438,374	6,900,576	2,645
Montgomery	94,354,319	73,056,925	167,411,244	1,499
Prince George's	271,430,029	58,828,495	330,258,524	2,884
Queen Anne's	11,209,005	2,887,324	14,096,329	2,481
St. Mary's	31,317,755	6,315,529	37,633,284	2,977
Somerset	10,183,858	1,672,701	11,856,559	3,555
Talbot	3,870,766	2,009,572	5,880,338	1,428
Washington	46,735,866	9,204,315	55,940,181	3,014
Wicomico	33,916,759	6,460,815	40,377,574	3,101
Worcester	3,757,580	3,335,913	7,093,493	1,163
Statewide	$1,576,481,338	$395,405,702	$1,971,887,040	$2,605

Note: September 30th enrollment used to calculate per student amounts. Prekindergarte and kindergarten students counted as one-half time if in half-day programs.

Prepared by the Department of Fiscal Services, May 1997

Appendix 1c
State Operating Education Aid - Fiscal 1996
Actual Aid

	Direct Education Aid	Teacher's Retirement Costs	Total Education Aid	Per Pupil Aid
Allegany	$32,868,765	$5,367,334	$38,236,099	$3,520
Anne Arundel	126,869,077	37,904,941	164,774,018	2,417
Baltimore City	371,151,018	52,204,851	423,355,869	4,049
Baltimore	170,543,236	54,380,753	224,923,989	2,300
Calvert	24,146,835	6,645,514	30,792,349	2,397
Caroline	15,040,947	2,615,952	17,656,899	3,207
Carroll	54,022,372	12,193,782	66,216,154	2,786
Cecil	34,257,852	7,049,355	41,307,207	2,973
Charles	47,367,211	10,265,966	57,633,177	2,868
Dorchester	13,627,259	2,507,644	16,134,903	3,241
Frederick	67,287,542	15,719,024	83,006,566	2,659
Garrett	14,699,501	2,665,473	17,364,974	3,346
Harford	82,282,438	17,398,993	99,681,431	2,852
Howard	57,618,734	22,231,137	79,849,871	2,208
Kent	5,569,008	1,530,643	7,099,651	2,651
Montgomery	109,059,907	79,364,464	188,424,371	1,642
Prince George's	282,369,911	61,947,729	344,317,640	2,908
Queen Anne's	11,633,001	3,072,613	14,705,614	2,479
St. Mary's	32,348,330	6,688,286	39,036,616	2,963
Somerset	10,282,764	1,751,812	12,034,576	3,849
Talbot	4,038,095	2,145,454	6,183,549	1,454
Washington	48,028,289	9,688,951	57,717,240	3,063
Wicomico	34,804,400	6,888,458	41,692,858	3,168
Worcester	4,108,148	3,589,288	7,697,436	1,217
Statewide	$1,654,024,640	$425,818,417	$2,079,843,057	$2,699

Note: September 30th enrollment used to calculate per student amounts. Prekindergarte and kindergarten students counted as one-half time if in half-day programs.

Prepared by the Department of Fiscal Services, May 1997

Appendix 1d
State Operating Education Aid - Fiscal 1997
Working Appropriation

	Direct Education Aid	Teacher's Retirement Costs	Total Education Aid	Per Pupil Aid
Allegany	$33,879,401	$5,659,252	$39,538,653	$3,672
Anne Arundel	131,109,387	39,966,508	171,075,895	2,472
Baltimore City	384,170,117	55,044,159	439,214,276	4,238
Baltimore	182,439,490	57,338,403	239,777,893	2,390
Calvert	26,528,095	7,006,949	33,535,044	2,480
Caroline	16,520,271	2,758,228	19,278,499	3,435
Carroll	57,751,261	12,856,975	70,608,236	2,871
Cecil	36,174,748	7,432,754	43,607,502	3,079
Charles	49,612,749	10,824,309	60,437,058	2,983
Dorchester	14,365,010	2,644,029	17,009,039	3,379
Frederick	71,788,654	16,573,947	88,362,601	2,742
Garrett	15,184,534	2,810,442	17,994,976	3,484
Harford	85,771,783	18,345,286	104,117,069	2,906
Howard	60,640,994	23,440,240	84,081,234	2,244
Kent	5,876,608	1,613,891	7,490,499	2,757
Montgomery	121,724,523	83,680,924	205,405,447	1,757
Prince George's	300,146,371	65,316,931	365,463,302	3,021
Queen Anne's	12,420,908	3,239,726	15,660,634	2,595
St. Mary's	34,816,399	7,052,047	41,868,446	3,098
Somerset	10,457,992	1,847,089	12,305,081	4,065
Talbot	4,398,675	2,262,141	6,660,816	1,555
Washington	49,676,466	10,215,912	59,892,378	3,168
Wicomico	36,295,601	7,263,106	43,558,707	3,293
Worcester	4,899,517	3,784,502	8,684,019	1,344
Statewide	$1,746,649,554	$448,977,750	$2,195,627,304	$2,801

Note: September 30th enrollment used to calculate per student amounts. Prekindergarte and kindergarten students counted as one-half time if in half-day programs.

Prepared by the Department of Fiscal Services, May 1997

Appendix 1e
State Operating Education Aid - Fiscal 1998
Legislative Appropriation

	Direct Education Aid	Teacher's Retirement Costs	Total Education Aid	Per Pupil Aid
Allegany	$35,510,412	$5,609,336	$41,119,748	$3,805
Anne Arundel	139,941,274	39,613,996	179,555,270	2,548
Baltimore City	423,238,651	54,558,660	477,797,311	4,655
Baltimore	204,999,346	56,832,668	261,832,014	2,561
Calvert	29,547,670	6,945,146	36,492,816	2,609
Caroline	17,694,548	2,733,900	20,428,448	3,568
Carroll	63,153,352	12,743,574	75,896,926	3,029
Cecil	39,193,722	7,367,196	46,560,918	3,219
Charles	52,906,604	10,728,837	63,635,441	3,072
Dorchester	15,130,103	2,620,708	17,750,811	3,458
Frederick	78,538,058	16,427,762	94,965,820	2,854
Garrett	15,937,558	2,785,654	18,723,212	3,639
Harford	92,895,174	18,183,478	111,078,652	3,026
Howard	67,308,279	23,233,493	90,541,772	2,321
Kent	6,336,272	1,599,657	7,935,929	2,858
Montgomery	132,771,048	82,942,843	215,713,891	1,793
Prince George's	331,729,909	64,740,824	396,470,733	3,212
Queen Anne's	13,140,260	3,211,151	16,351,411	2,646
St. Mary's	37,873,033	6,989,847	44,862,880	3,207
Somerset	10,711,769	1,830,798	12,542,567	4,170
Talbot	4,330,006	2,242,188	6,572,194	1,513
Washington	52,291,792	10,125,806	62,417,598	3,249
Wicomico	39,032,284	7,199,044	46,231,328	3,438
Worcester	3,927,239	3,751,122	7,678,361	1,165
Statewide	$1,908,138,363	$445,017,688	$2,353,156,051	$2,946

Note: September 30th enrollment used to calculate per student amounts. Prekindergarte and kindergarten students counted as one-half time if in half-day programs.

Prepared by the Department of Fiscal Services, May 1997

Appendix 1f
State Operating Education Aid

	FY 1994 Per Pupil Aid	FY 1995 Per Pupil Aid	FY 1996 Per Pupil Aid	FY 1997 Per Pupil Aid	FY 1998 Per Pupil Aid
Allegany	$3,198	$3,401	$3,520	$3,672	$3,805
Anne Arundel	2,328	2,376	2,417	2,472	2,548
Baltimore City	3,660	3,689	4,049	4,238	4,655
Baltimore	2,095	2,209	2,300	2,390	2,561
Calvert	2,294	2,395	2,397	2,480	2,609
Caroline	3,121	3,397	3,207	3,435	3,568
Carroll	2,665	2,729	2,786	2,871	3,029
Cecil	2,877	2,954	2,973	3,079	3,219
Charles	2,834	2,875	2,868	2,983	3,072
Dorchester	3,224	3,457	3,241	3,379	3,458
Frederick	2,560	2,627	2,659	2,742	2,854
Garrett	3,247	3,330	3,346	3,484	3,639
Harford	2,697	2,772	2,852	2,906	3,026
Howard	2,051	2,112	2,208	2,244	2,321
Kent	2,592	2,645	2,651	2,757	2,858
Montgomery	1,384	1,499	1,642	1,757	1,793
Prince George's	2,729	2,884	2,908	3,021	3,212
Queen Anne's	2,488	2,481	2,479	2,595	2,646
St. Mary's	2,987	2,977	2,963	3,098	3,207
Somerset	3,450	3,555	3,849	4,065	4,170
Talbot	1,419	1,428	1,454	1,555	1,513
Washington	2,919	3,014	3,063	3,168	3,249
Wicomico	2,960	3,101	3,168	3,293	3,438
Worcester	1,163	1,163	1,217	1,344	1,165
Statewide	$2,522	$2,605	$2,699	$2,801	$2,946

Prepared by the Department of Fiscal Services

Appendix 2a

State Public School Construction Funding

	Fiscal 94	Fiscal 95	Fiscal 96	Fiscal 97	Fiscal 98*	Fiscal 94-98
Allegany	$1,940,000	$455,000	$4,756,000	$2,653,000	$510,000	$10,314,000
Anne Arundel	4,614,000	5,173,000	3,790,000	5,125,000	3,761,000	22,463,000
Baltimore City	7,363,000	8,272,000	7,299,000	8,994,000	10,000,000	41,928,000
Baltimore	4,364,000	6,611,000	9,358,000	15,285,000	25,000,000	60,618,000
Calvert	4,225,000	4,618,000	6,073,000	4,092,000	3,164,000	22,172,000
Caroline	137,000	487,000	592,000	1,501,000	1,638,000	4,355,000
Carroll	3,013,000	4,520,000	5,237,000	6,339,000	5,935,000	25,044,000
Cecil	4,135,000	5,399,000	4,566,000	3,905,000	2,385,000	20,390,000
Charles	2,779,000	5,308,000	4,331,000	7,954,000	5,807,000	26,179,000
Dorchester	231,000	411,000	842,000	3,450,000	1,086,000	6,020,000
Frederick	4,133,000	8,050,000	6,896,000	4,695,000	6,486,000	30,260,000
Garrett	0	127,000	2,887,000	444,000	439,000	3,897,000
Harford	5,751,000	6,392,000	5,504,000	4,764,000	4,523,000	26,934,000
Howard	8,877,000	12,933,000	7,455,000	9,132,000	6,003,000	44,400,000
Kent	395,000	383,000	398,000	552,000	316,000	2,044,000
Montgomery	18,028,000	22,705,000	20,051,000	36,115,000	38,000,000	134,899,000
Prince George's	7,331,000	11,020,000	11,169,000	6,048,000	20,300,000	55,868,000
Queen Anne's	1,888,000	33,000	48,000	3,882,000	2,895,000	8,746,000
St. Mary's	1,981,000	63,000	3,876,000	5,499,000	5,721,000	17,140,000
Somerset	0	886,000	2,792,000	501,000	72,000	4,251,000
Talbot	1,389,000	0	3,921,000	205,000	1,157,000	6,672,000
Washington	274,000	4,663,000	1,808,000	4,235,000	2,308,000	13,288,000
Wicomico	3,675,000	360,000	4,094,000	3,718,000	2,487,000	14,334,000
Worcester	455,000	451,000	901,000	324,000	288,000	2,419,000
Statewide	$86,978,000	$109,320,000	$118,644,000	$139,412,000	$150,281,000	$604,635,000

* There is an additional $19,000 in contingency funds for a total FY 1998 funding level of $150.3 million.

Prepared by the Department of Fiscal Services, May 1997

Appendix 2b
Per Pupil State Public School Construction Funding

	Fiscal 94	Fiscal 95	Fiscal 96	Fiscal 97	Fiscal 98*	Fiscal 94-98*
Allegany	$180.33	$42.01	$437.88	$246.36	$47.19	$190.91
Anne Arundel	69.94	76.78	55.60	74.06	53.37	65.84
Baltimore City	68.31	76.60	69.81	86.79	97.43	79.62
Baltimore	47.73	69.29	95.67	152.38	244.56	124.42
Calvert	361.20	378.43	472.83	302.58	226.24	345.07
Caroline	26.77	92.27	107.52	267.41	286.06	159.87
Carroll	132.87	193.28	220.31	257.78	236.88	209.61
Cecil	314.83	399.45	328.61	275.68	164.87	294.76
Charles	144.39	270.91	215.54	392.65	280.31	262.03
Dorchester	47.30	84.26	169.11	685.44	211.56	241.69
Frederick	142.34	266.65	220.92	145.67	194.90	194.04
Garrett	0.00	24.88	556.26	85.95	85.32	151.51
Harford	174.36	187.36	157.50	132.95	123.21	154.27
Howard	268.40	372.20	206.17	243.68	153.90	246.03
Kent	155.08	146.83	148.62	203.15	113.81	153.37
Montgomery	166.67	203.34	174.73	308.94	315.85	235.92
Prince George's	65.36	96.22	94.33	50.00	164.47	94.77
Queen Anne's	340.30	5.81	8.09	643.38	468.52	297.74
St. Mary's	160.83	4.98	294.25	406.87	408.90	261.14
Somerset	0.00	265.67	893.01	165.51	23.94	267.76
Talbot	340.11	0.00	921.83	47.85	266.37	316.45
Washington	15.05	251.23	95.95	224.00	120.13	141.77
Wicomico	285.55	27.65	311.12	281.09	184.93	218.09
Worcester	77.24	73.93	142.43	50.14	43.71	77.12
Statewide	$117.84	$144.43	$153.95	$177.84	$188.13	$157.12

* does not include the $75 million in funding appropriated in fiscal 1998 that has yet to be awarded to local school districts.

Prepared by the Department of Fiscal Services, May 1997

Fiscal Impact of Prince George's County's Milliken II Schools

November 1997

Department of Legislative Services
Office of Policy Analysis

Annapolis, Maryland

Fiscal Impact of Prince George's County's Milliken II Schools

Introduction

- Milliken II programs are provided in 21 county schools (18 elementary schools, 1 middle school, and 2 high schools). Over 11,500 students are enrolled in Milliken II schools, representing approximately 9% of total student enrollment in the county. **Appendix 1** lists the schools currently served by the Milliken II program.

- Milliken II schools provide additional staffing and enriched resources for students attending schools with limited integration. The program is specifically designed to enhance the quality of instruction and the potential for achievement among all students attending the school. Milliken II schools operate with a 20 to one student-teacher ratio.

County Funding For Milliken II Schools

- Prince George's County Schools allocated approximately $28.5 million in fiscal 1998 for Milliken II, model-comprehensive and magnet programs. This represents almost 4% of the school system's budget. (This amount does not include $6.4 million in transportation costs associated with these programs).

- Of this amount, $10.3 million was provided to Milliken II schools, resulting in approximately $500,000 in additional funding per Milliken II school. **Exhibit 1** compares the level of county funding for Milliken II, model-comprehensive, and magnet school programs.

Exhibit 1
Milliken II, Model-Comprehensive, and Magnet School Funding

Program Type	# of Schools	FY 1998 Funding	Funding Per School
Milliken II	21	$10,343,212	$492,534
Model Comprehensive	20	3,668,504	183,425
TAG Magnets	11	2,876,014	261,456
Science/Math/Tech	11	1,693,517	153,956
Montessori	5	1,155,026	231,005
Traditional/Classical-Academic Centers	12	1,730,548	144,212
All Programs	101	$28,536,002	$282,535

Source: FY 1998 Prince George's County School Budget

- Milliken II schools receive significantly more county funding than model-comprehensive and other magnet schools.

New Millennium Education Program

- The Prince George's County Board of Education's next millennium plan calls for the establishment of 29 additional Milliken II schools and 62 model comprehensive elementary schools, while maintaining the current Magnet Program.

- Of the proposed 29 new Milliken II schools, 25 of them would be created at the elementary level, one would be created at the middle school level, and three would be created at the high school level.

- As illustrated in **Exhibit 2**, eleven of the proposed Milliken II sites are new or newly re-opened schools, 5 do not currently operate under a magnet program, and thirteen currently have either a model-comprehensive or magnet program in place.

Exhibit 2
Current Status of Proposed Milliken II Schools

Current Status	Number of Schools	Student Enrollment
New/ Re-Opened	11	6,725
Non-magnet Program	5	3,018
Model Comprehensive	6	2,814
Talented and Gifted	2	1,013
Montessori	1	510
Science, Math, & Technology	1	529
Traditional/Classical Academy	1	633
Humanities & International Studies*	1	1,190
Biotechnology*	1	1,023
All New Proposed Sites	29	17,455

*County board decided that these two magnet programs serving Central and Fairmont Heights High Schools will remain in place after the schools convert to the Milliken II program.

- Of the thirteen schools with model-comprehensive or magnet programs, only two will retain their magnet programs once the schools convert to the Milliken II program. Six of these schools currently use the model comprehensive program.

- The model comprehensive program provides additional instructional resources to schools where student enrollment exceeds the court established racial composition guidelines. Services include all-day kindergarten, student to staff ratios of not more than 25 to 1, and full-time media specialist and counselor support.

Estimated Fiscal Impact of Converting to Milliken II Status

- Based on student enrollment counts and aggregate funding levels as detailed in the county's fiscal 1998 school budget, Milliken II schools receive approximately $900 in additional funding per student. This is approximately $510 more per pupil than provided to model comprehensive schools. **Exhibit 3** compares the level of per pupil funding for the Milliken II, model-comprehensive, and magnet school programs.

Exhibit 3
Comparison of Per Pupil Funding For Milliken, Model-Comprehensive and Magnet School Programs

Magnet Program	Per Pupil Funding	Amount of Per Pupil Funding Below Milliken II Level
Milliken II	$900	$0
Model Comprehensive	$390	$510
Talented and Gifted	$470	$430
Science/Math/Technology	$200	$700
Montessori	$400	$500
Traditional-Classical	$140	$760

- Based on the above per pupil costs and the county's next millennium plan, establishing 29 additional Milliken II schools could cost between $13 million to $14 million when the program is completely phased-in. **Appendix 2** shows the methodology for the calculation.

School Construction Costs

- Prince George's County's next millennium plan provides for the construction of eight new Milliken II elementary schools and one additional Milliken II middle school, thus resulting in the need for more classrooms to handle the lower student-teacher ratios. Total additional classrooms at these schools are expected to cost approximately $10.5 million.

- Based on data taken from the county's next millennium plan, the average plan capacity for a new elementary school totals 610 students. Utilizing a student-teacher ratio of 20 to 1 instead of an IAC state-rated capacity of 25 to 1 would require an additional six classes to be constructed at each school.

- Based on an average elementary school classroom cost of $180,000, school construction costs could increase by around $1.1 million per school. The plan calls for eight new elementary schools at an estimated cost of $8.8 million.

- At the secondary school level, the average construction cost for each additional classroom totals $214,000. Utilizing a 20 to 1 ratio at a school with an enrollment of 800 students would require 8 additional classrooms at a cost of $1.7 million. The next millennium plan calls for one additional Milliken II school.

- In addition, the school system may have to construct additional classrooms at 20 existing schools once the county implements the Milliken II program at these sites.

Appendix 1

Schools Currently Served by the Milliken II Program

Schools	Level	Enrollment (9/96)
Ardmore	Elementary	475
Barnaby Manor	Elementary	668
Berkshire	Elementary	447
Bradbury Heights	Elementary	681
Carmody Hills	Elementary	583
Chillum	Elementary	477
Columbia Park	Elementary	506
District Heights	Elementary	469
Dodge Park	Elementary	516
Forest Heights	Elementary	342
Glassmanor	Elementary	352
Green Valley	Elementary	421
Hillcrest Heights	Elementary	419
John Bayne	Elementary	438
Morningside	Elementary	546
Overlook	Elementary	617
Panorama	Elementary	251
William Beanes	Elementary	564
		8,772
Benjamin Stoddert	Middle	590
Robert Goddard*	Middle	160
G. Gardner Shugart*	Middle	80
		830
Forestville	High	889
Potomac	High	1,124
		2,013
Total Enrollment of Milliken II Schools		11,615
Milliken II FY 1998 County Funding		$10,343,212
Per Pupil Funds		$890.50

*Not all students enrolled in these two schools receive Milliken II services. The number used in this report for these two schools is only an estimate.

Prepared by the Department of Legislative Services, November 1997

Appendix 2
Fiscal Impact of Coverting Schools to Milliken II Status

Additional Schools	Current Status	Proposed Status	Sept. 96 Enrollment*	Additional Per Pupil Cost	Additional Total Cost
Elementary Schools (25)					
Apple Grove	Model Comprehensive	Milliken II	639	$510	$325,890
Avalon	Model Comprehensive	Milliken II	411	510	209,610
Benjamin Davis	New	Milliken II	625	900	562,500
Capitol Heights	Talented/Gifted	Milliken II	405	430	174,150
Capitol Heights Area	New	Milliken II	600	900	540,000
Dodge Park No. 2	New	Milliken II	600	900	540,000
Edgar Allen Poe	Regular	Milliken II	268	900	241,200
Fort Foote	Regular	Milliken II	374	900	336,600
Francis Scott Key	New	Milliken II	600	900	540,000
Highland Park	Re-opened	Milliken II	440	900	396,000
Hill-Mar	New	Milliken II	600	900	540,000
James McHenry	Model Comprehensive	Milliken II	631	510	321,810
John Carroll	Science/Math/Technology	Milliken II	529	700	370,300
John Howard	Regular	Milliken II	420	900	378,000
John Hanson	Re-opened	Milliken II	600	900	540,000
Lyndon Hill	Model Comprehensive	Milliken II	391	510	199,410
Matthew Henson	Montessori	Milliken II	510	500	255,000
Middleton Valley	Traditional-Classical	Milliken II	633	760	481,080
North Forestville	Model Comprehensive	Milliken II	376	510	191,760
Oakcrest	Talented/Gifted	Milliken II	608	430	261,440
Seat Pleasant	Regular	Milliken II	510	900	459,000
Seat Pleasant No. 2	New	Milliken II	660	900	594,000
Thomas Claggett	Model Comprehensive	Milliken II	366	510	186,660
Thorne Drive	New	Milliken II	600	900	540,000
West Green Valley	New	Milliken II	600	900	540,000
					9,724,410
Middle School (1)					
Hill Road	New	Milliken II	800	$900	720,000
High Schools (3)					
Central	Humanities & Int. Studies	Milliken II	1,190	$900	1,071,000
Crossland	Regular	Milliken II	1,446	900	1,301,400
Fairmont Heights	Biotechnology	Milliken II	1,023	900	920,700
					3,293,100
All Schools			17,455		**$13,737,510**

*Enrollment for New or Re-opened schools are based on plan capacity estimates.

Prepared by the Department of Legislative Services, November 1997

Maryland State Department of
EDUCATION

Schools for Success

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October 14, 1997

The Honorable Howard P. Rawlings
151 Lowe House Office Building
Annapolis, Maryland 21401-191

Dear Delegate Rawlings:

On August 22, 1997, you requested information on Prince George's County Public Schools. You asked me to discuss the effect of court-ordered busing, the progress of Milliken and Magnet Schools, student performance, teacher performance, the fiscal condition of Prince George's County Schools, and school construction.

Based on existing data collected by the State Department of Education, I am able to report to you our analysis of the performance of Milliken and Magnet Schools, and the performance of students and teachers. The Attorney General's Office will report to you on the impact of court-ordered busing. The Department of Fiscal Legislative Services will report to you on its analysis of the school system's fiscal condition, and the Interagency Committee on School Construction will report to you on the school construction issues you raised.

I hope that the enclosed responses aid you and the Task Force on School Funding and Accountability in understanding the broad and complex issues you have identified. I concur with your commitment to ensuring that all students statewide receive a quality education and appropriate resources for success. No greater investment in the future will yield more than our accountable investments in the education of our young people.

Sincerely,

Nancy S. Grasmick

Nancy S. Grasmick
State Superintendent of Schools

NSG:rp

Maryland State Department of Education

Responses to Delegate Rawlings 8/22/97 Letter on Prince George's County

October 14, 1997

1. EFFECT OF COURT-ORDERED BUSING

a. Please quantify the current scope of court-ordered busing in the County and the current demographic makeup of the County school system.

The Department of Legislative Services will be responding to the above question.

b. If the Court were to dismiss the pending NAACP lawsuit without ordering additional remedies, what additional obligations or financial burdens would accrue to the Prince George's County school system?

Deputy Attorney General Carmen M. Shepard responded to this question in her letter dated September 22, 1997 addressed to Delegate Howard P. Rawlings.

c. What is MSDE's evaluation of the Prince George's County Public Schools proposed six year plan for ending busing? Comment on the plan's educational objectives, and its fiscal impact? What is the status of this plan and its approval by the Prince George's County School Board and government, the State, and the Federal Court?

It is the Department's understanding that the Prince George's County School System is in the final stages of completing the revised plan. The plan is scheduled to be presented to the Prince George's County Board of Education on October 15, 1997. Upon completion and approval of the plan, the Department will review it and provide comments to the Task Force.

2. MILLIKEN SCHOOLS AND MAGNET SCHOOLS

a. Provide MSDE's evaluation of the current state of magnet and Milliken schools. What rationale exists for State subsidies of the magnet and Milliken programs? Is there any correlation between Milliken school funding and school performance?

Prince George's County has classified their schools into four major groups on the basis of the programs in the schools: Comprehensive, Model Comprehensive, Milliken, and Magnet Schools (see Exhibit 6, pg. 21 for definitions). The performance of these programs relative to county average performance is depicted in Exhibits 1 through 5 (pgs. 16 - 20). For elementary schools, the Comprehensive, Magnet, and Model Comprehensive schools in 1996 marginally exceeded the performance of the county average while the Milliken schools fell well below the average.

(Exhibit 1, pg. 16) While schools in all program types improved since 1993, only the Model Comprehensive schools demonstrated average annual change in performance that exceeded the county average (see Exhibit 2, pg. 17). For middle schools, only the Magnet schools performed higher than the county average. The Milliken school performed substantially below (see Exhibit 3, pg. 18). Since 1993, the average annual change of the Milliken and Magnet schools exceeded the county average while the improvement in Comprehensive schools was lower (Exhibit 4, pg. 19). All high schools are performing at a high level with the Milliken schools slightly below the county average. The Magnet and Comprehensive schools are performing slightly above the county average (see Exhibit 5, pg. 20). The performance levels of the high schools have been essentially static since 1993 with a slight overall decline in average annual change.

b. What is the basis in the six year plan for continuing "Milliken-type funding" for some schools within the system, but not others?

See response to question 1.c.

c. Does MSDE recommend State or local investment to reduce Prince George's class sizes beyond existing levels?

The facts of class size are:

1. Smaller classes in grades K-3 are related to moderate gains in student achievement.
2. The benefit in the K-3 grades is most apparent when class sizes are 15 or less.
3. Minority and disadvantaged students benefit more than other students as a consequence of reduced class size.
4. Reducing class size has little effect unless it also includes changes in teaching practices. For the most part decreasing class size allows teachers the opportunity to improve classroom climate and employ sound educational practices.
5. The maximum gain associated with reducing class size is realized if the reduction is targeted to specific groups for specific purposes. Generic reductions in class size produce inconsistent results.
6. Reducing class size in all other grades (4-12) appears to have little effect on student performance.

Source: Robinson, G.E. Synthesis of Research on the Effects of Class Size. *Educational Leadership*, 1990 47(7), 80,82-88,90

Reducing class size can only be evaluated in the context of its relationship to programs. Any conclusions depend on the finalization of the six year plan.

d. **How much money is being granted to Challenge Schools in the County and what is the progress of these schools?**

Prince George's County has participated in the Challenge Schools Initiative for the last five years. One high, one middle and three elementary schools were initially identified in 1993, three more elementary schools were added in 1995, and during 1997, ten additional elementary schools joined the Initiative. A total of 18 schools participate in the Challenge School initiative. Since 1993, a total of $11.5 million has been allocated to Prince George's County.

Four years of Maryland School Performance Program (MSPP) data is available for the original five schools (3 elementary schools, 1 middle school, 1 high school). The three Challenge Elementary schools in Prince George's County have demonstrated average annual gains in performance since 1993. These three elementary schools continue to perform below the county average (34.58 vs. 46.05) but, have demonstrated annual average performance gains greater than the county (4.93 vs. 3.45).

3. STUDENT PERFORMANCE

a. **Provide MSDE's assessment of school performance in the Prince George's County Public Schools, including results from MSPAP, SAT, and other performance indicators. This would include assessments of student readiness by postsecondary institutions, dropout rates, and other indicators. What has been the County's response to poorly performing schools?**

Apparently in 1996-97, Prince George's County stemmed the consistent decline in SAT performance that it exhibited 1993-94 through 1995-96. They have yet to regain the performance level reported in 1992-93. On the state level, Maryland's high school students posted higher SAT scores (507 verbal and 504 mathematics) in 1996-97, continuing six years of steady improvement.

	1992-93	**1993-94**	**1994-95**	**1995-96**	**1996-97**
PG Verbal	454	450	449	448	452
PG Math	447	443	443	441	443

The percentage increase in number of students taking the SATs is not out of line with the increase in county enrollment during the same period. Likewise, the percent increase in number of African American students taking the test does not outpace the increase in African American enrollment.

Since 1991, the dropout rate in Prince George's County has been consistently lower than the state average. In 1996, Prince George's County was one of the 17 school systems that had dropout rates lower than the state.

Compared to other school systems, in 1996 thirteen of the twenty-four school systems had dropout rates higher than Prince George's County.

Prince George's County schools have been consistently at the low end of systems since the beginning of the MSPP. The trends over the past few years indicate that Prince George's and Somerset are with the exception of Baltimore City the lowest performers.

Exhibit A (shown below) demonstrates the performance of Prince George's County, in relation to the state average, Howard County, Somerset County, and Baltimore City. System performance is depicted by the School Performance Index (SPI) which is a measure of how far a school system is from achieving the satisfactory standards for the data based areas of the MSPP report card. A value of 100 or more indicates that a school or system has met or exceeded the satisfactory standard. A value of less than 100 indicates that a school or system has not yet met the satisfactory standard. The smaller the value the further away a school or system is from the state standard.

Exhibit A

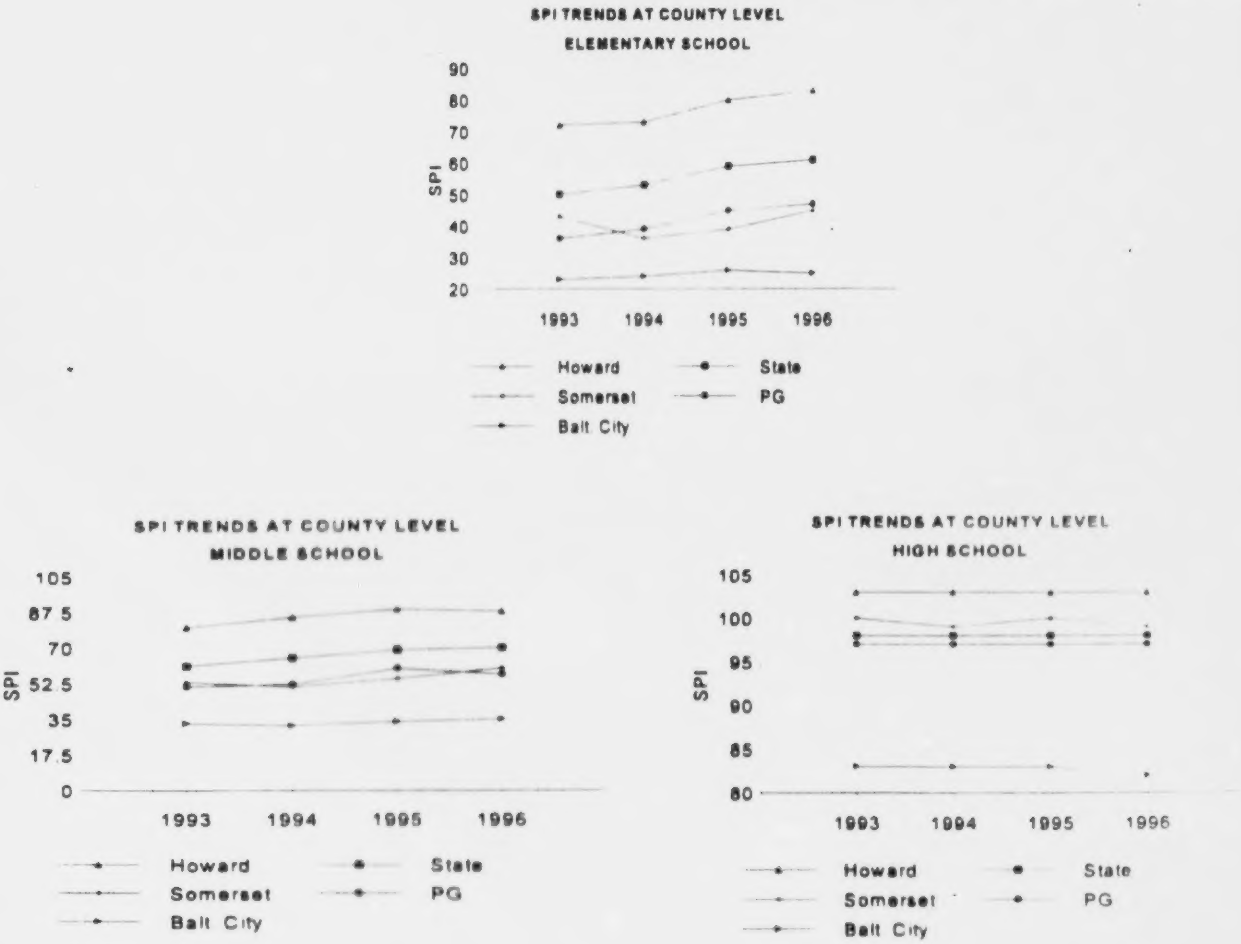


Exhibit B (shown below) presents the ranking of all school systems in 1996.

Exhibit B
1996 Maryland SPI

1996 Elementary SPI	
Howard	82.62
Carroll	78.49
Frederick	76.72
Harford	76.71
Kent	75.03
Montgomery	74.40
Anne Arundel	73.86
Calvert	71.17
Talbot	69.82
St. Mary's	69.20
Baltimore County	64.76
Queen Anne's	64.39
Washington	61.93
Caroline	61.60
Cecil	61.40
State	**60.75**
Allegany	59.66
Dorchester	58.35
Garrett	58.12
Charles	53.30
Worcester	52.29
Wicomico	51.63
Prince George's	46.56
Somerset	44.84
Baltimore City	25.31

1996 Middle SPI	
Carroll	89.04
Garrett	88.51
Frederick	88.40
Howard	87.73
Harford	81.64
Calvert	81.17
Montgomery	80.93
Kent	80.68
Washington	79.82
Queen Anne's	78.42
Baltimore County	76.81
Talbot	74.90
Charles	74.30
Cecil	72.28
St. Mary's	70.57
Anne Arundel	70.57
Allegany	70.32
Dorchester	69.93
State	**69.57**
Worcester	69.20
Wicomico	67.67
Caroline	62.28
Somerset	60.36
Prince George's	57.17
Baltimore City	34.98

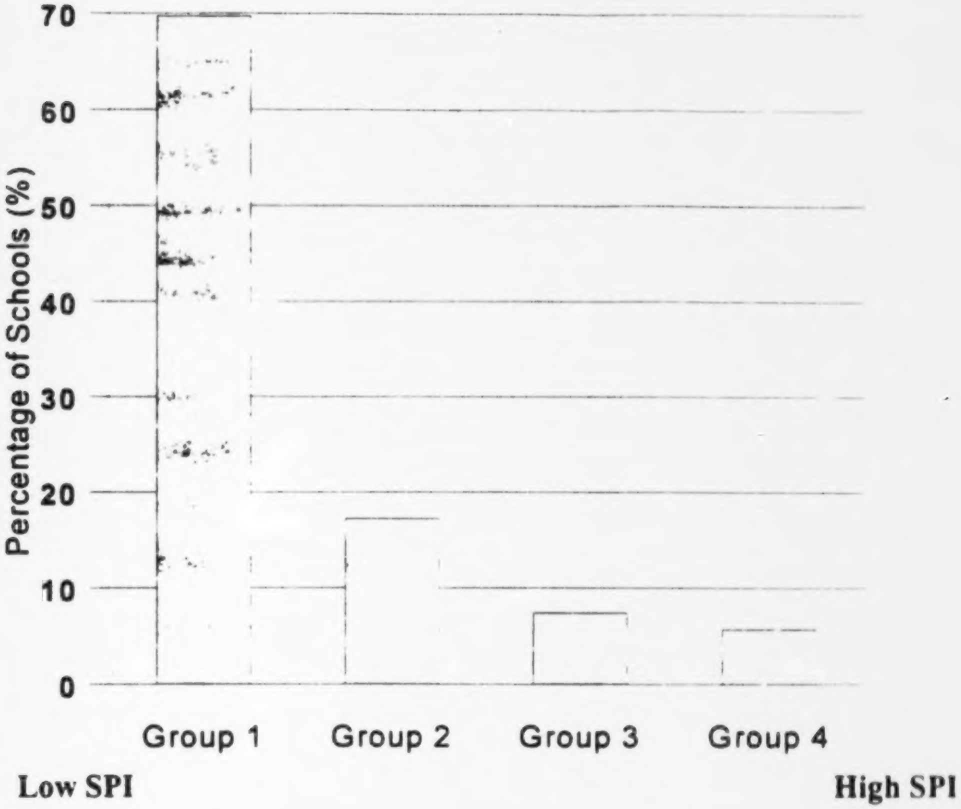
1996 High SPI	
Howard	102.84
Garrett	102.59
Calvert	102.53
Carroll	102.43
Montgomery	102.03
Frederick	101.99
Kent	101.92
Washington	101.46
Queen Anne's	101.23
Talbot	101.13
Anne Arundel	101.10
Dorchester	101.00
Harford	100.86
Allegany	100.45
Charles	100.43
Baltimore County	100.29
Worcester	100.14
Cecil	99.89
Somerset	99.38
Caroline	99.19
St. Mary's	99.03
Wicomico	98.46
State	**98.08**
Prince George's	96.78
Baltimore City	81.73

Using the 1996 SPI, 104 of 122 or 85% of the elementary schools in Prince George's County rank below the state median SPI of 60.94.

When all the elementary schools (excluding those in Baltimore City) are ranked in quartiles by 1996 SPI, 85 (69.7%) elementary schools in Prince George's County are in the bottom quartile. While 7 (5.7%) schools are ranked in the highest quartile. See Exhibit C (pg. 6). Excluding Baltimore City, Prince George's County schools account for nearly half of all schools scoring in the lowest quartile.

Exhibit C

Distribution of Prince George's Schools in Four Statewide Performance Groups
Elementary Level - Without Baltimore City
1996 SPI



Note: The four statewide groups are the four quartiles obtained from the state elementary level data that include schools having valid 1996 SPI.

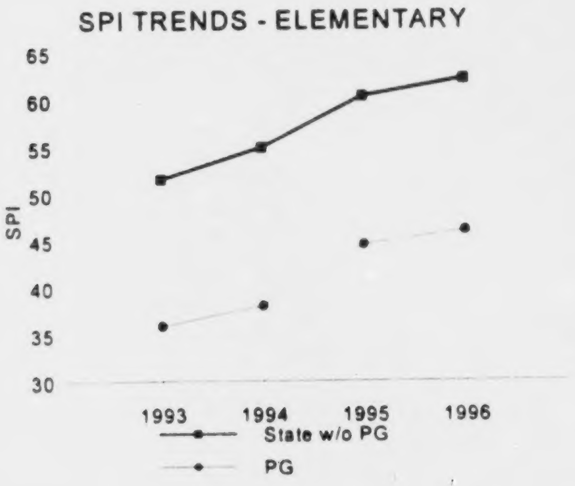
SPI Ranges for the Number of P.G. Schools in the Four Groups:

Group 1 (Quartile 1 = 85 Schools):	19.25 - 50.85
Group 2 (Quartile 2 = 21 Schools):	50.86 - 65.55
Group 3 (Quartile 3 = 9 Schools):	65.56 - 80.62
Group 4 (Quartile 4 = 7 Schools):	80.63 - 123.94

IMPROVEMENT IN PERFORMANCE OF ELEMENTARY SCHOOLS

Prince George's County has demonstrated improved performance since 1993. The improvement has paralleled that of the state elementary schools (Exhibit D, shown below). This holds at school level. The percentage of schools in Prince George's County and the state that have improved or declined each year since 1993 are nearly identical.

Exhibit D



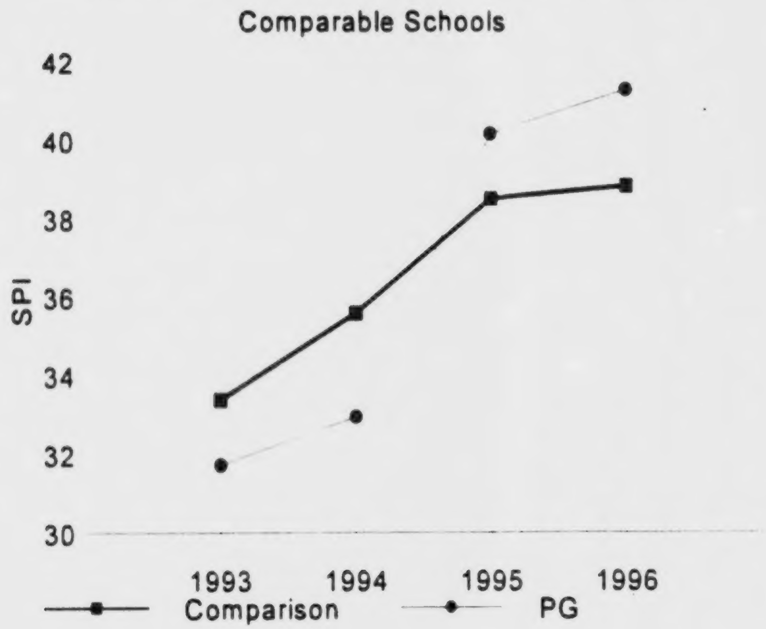
N may change each year PG 1996 N=122 State 1996 N=685

FACTORS VIEWED AS INFLUENCING CURRENT SCHOOL ACHIEVEMENT

A number of studies indicate a relationship between low performance and high levels of poverty and concentrations of minority student enrollment. These studies frequently identify high African-American (AA) enrollment and high poverty as measured by participation in Free and Reduced Price Meal (FRPM) as associated with lower school performance. Seventy percent (86 of 122) of the elementary schools in Prince George's County have percentages of African American enrollment and FRPM participation greater than the state medians of 20.05% and 29.15% respectively.

In order to examine the performance of Prince George's County schools in relation to schools with similar demographic characteristics, we identified 47 schools (from 10 systems) in the state that had similar percentages of FRPM and AA enrollments. These schools were compared to 83 Prince George's County Schools (Note: 3 of the original 86 schools did not have data for all years for comparison and were dropped from the analysis). The Prince George's schools in the sample have a median of 52% FRPM and 80% AA enrollment. The comparison schools have a median of 54% FRPM and 69% AA enrollment. Exhibit E (pg. 8) demonstrates that Prince George's County schools started at a lower level of performance in 1993 and rose to a higher level of performance in 1996 than the comparison schools.

Exhibit E



COMPARABLE SCHOOLS SPI TREND

These schools were examined for consistency in their improvement - 23 Prince George's County schools (23 of 83 or 28%) and 13 comparison schools (13 of 47 or 28%) demonstrated either consistent improvement from 1993 (improved each year) or exceeded the state median performance in 1996.

These Prince George's County schools have employed a variety of strategies and have a variety of programs. Exhibit F (pg. 9) lists the 23 schools and the special programs in each. As is evident no single strategy emerges. No more than 50% of the schools using a particular intervention strategy consistently improved.

Exhibit F

ELEMENTARY SCHOOLS WITH EITHER 1996 SPI ABOVE STATE MEDIAN OR CONSISTENT IMPROVEMENT FROM 1993 TO 1996 OR BOTH

School No.	School Name	1996 SPI *	Change: 1993 to 1996**	Special Programs
0210	Rogers Heights	61.71	27.91	Magnet
0211	Glad. Spellman	73.56	29.23	Model Comprehensive
0213	Cooper Lane	32.45	9.41	Magnet
0214	Templeton	42.12	23.44	Comprehensive
0609	Morningside	31.75	15.56	Milliken II
0619	Princeton	76.03	40.77	Model Comprehensive
0624	Berkshire	42.33	17.87	Milliken II
0647	Concord	40.78	13.06	Magnet
1009	Oaklands	83.27	41.26	Comprehensive
1218	Valley View	49.46	13.02	Magnet
1310	Dodge Park	53.81	29.93	Milliken II
1319	John Carroll	56.28	24.28	Magnet
1710	Ridgecrest	24.03	6.29	MBRT, Atlas, Challenge, Comprehensive
1714	Adelphi	37.64	14.19	Atlas, Comprehensive
1719	Langley Park	34.60	14.74	Atlas, Comprehensive
1802	Seat Pleasant	31.96	17.89	Challenge, Model Comprehensive
1803	Lyndon Hill	53.88	34.64	
2006	Glenridge	38.90	15.78	Challenge, Comprehensive
2008	Ardmore	43.03	21.42	Milliken II
2106	Greenbelt	47.20	16.36	
2121	Cherokee Lane	58.37	15.47	Atlas, Comprehensive
2122	Magnolia	66.83	15.29	Comprehensive
2123	Paint Branch	61.04	10.18	Magnet

* Shaded box indicates 1996 SPI above state median

** Shaded box indicates SPI increase between each year, ie, consistent improvement

4 of 18 Milliken II schools in the county are consistently improving schools (all are high risk).

1 of 3 MBRT schools in the county is a consistently improving school (all are high risk).

4 of 8 Atlas schools in the county (with necessary data) are consistently improving schools in the high risk group (Beltsville is not in the high risk group).

3 of the 6 county Challenge schools are consistently improving schools (all are high risk schools).

4. TEACHER PERFORMANCE

a. How effective are the current procedures to evaluate principals and teachers?

Teacher evaluation is a local function. The Department does not routinely evaluate the procedures used by local school systems to evaluate teachers or principals. Attached is a bulletin issued by Prince George's County on the evaluation of tenured and non-tenured teachers as well as a copy of the form used for evaluation. (Attachment A, pgs. 22 - 25)

b. How many noncertificated teachers are employed by the Prince George's County Public Schools?

According to state regulation, teachers may be certified at various levels depending on their education and experience. Standard professional certificates are issued to those who have attended four year colleges and majored in education or majored in a subject area and taken required education courses. Provisional certificates are issued to those who have completed a four year college education, but may be lacking the required education courses, recent study, and/or qualifying National Teacher Exam (NTE) scores. Resident teacher certificates are issued to those who have a bachelor's degree in the area to be taught and qualifying National Teacher Exam scores. In some cases, there are teachers with no certificates. However, these teachers usually represent unique cases and, if eligible, are certified as soon as possible. If they cannot be certified, they are terminated.

According to the 1996-97 Fact Book, issued by the Department, there were 8,783 instructional personnel in the Prince George's County School System. In Prince George's County, during the 1996-97 school year, there were approximately 900 teachers with provisional certificates. During the same school year, there were approximately 19 teachers who had no certificate. Eighteen of the 19 teachers were terminated. Prince George's County does not participate in the Resident Teacher Program.

c. How does this compare to other subdivisions?

Attached is a chart entitled Comparison of Provisional Teachers in Prince George's County with other Maryland Subdivisions. (Attachment B, pg. 26)

d. How were these noncertificated teachers distributed among schools within the system?

Attached is a chart entitled Prince George's County Public Schools Teachers--Certification. (Attachment C, pgs. 27 - 30)

e. What has been the actual experience in Prince George's County in effectively responding to poorly performing principals and teachers?

During the last two years, the Prince George's County School System dismissed 30 educators (27 teachers and 3 school psychologists). Twenty-three of the 30 educators were allowed to retire or resign and 7 were dismissed. During the last two years, five administrators who were performing poorly were transferred to non-administrative positions.

f. **Provide an analysis of the Prince George's County Public Schools collective bargaining agreements as it impacted on accountability and student performance.**

REVIEW OF NEGOTIATED AGREEMENT BETWEEN PRINCE GEORGE'S COUNTY EDUCATORS' ASSOCIATION AND THE BOARD OF EDUCATION OF PRINCE GEORGE'S COUNTY

JULY 1, 1992 TO JUNE 30, 1996

In May, 1993, MSDE provided an analysis of the Baltimore City negotiated agreement for teachers as it impacted on accountability and student performance. A copy of that analysis is attached for your reference (Attachment D, pgs. 31 - 33). You have requested a similar analysis of the current Prince George's agreement. In response to your request, we have compared the negotiated agreement between the Prince George's County Educator's Association (PGCEA) and the Board of Education of Prince George's County for the period July, 1992 through June, 1996, with the concerns expressed regarding the Baltimore City Public Schools' negotiated agreement in effect in 1993. Our comparison of the two agreements discloses the following:

Subject Matter	Prince George's County (1992-96)	Baltimore City (1993)
Length of school days for teachers	7 hours 30 minutes	6 hours 50 minutes
Maximum school year for students	186.5 days	180 days
Maximum course load per week	not specified	25 periods
Non-instructional duties	not required to transport students; not expected to perform custodian duties	schools prohibited from assigning teachers to school cafeteria duty, playground duty, lunch time playground duty, collection of money, accessioning library books, schoolwide detention duty, lavatory duty, office duty, duplication of teaching materials, transporting students
Required faculty meetings beyond regular work day	2 per month (October-May); 3 per month (September and June)	none allowed

Subject Matter	Prince George's County (1992-96)	Baltimore City (1993)
Sick Leave	10-15 days (teachers begin with 10 days, and accumulate 1 additional day each year, up to the 15th year); maximum of 60 days payment upon retirement	15 days with 3 days annual cash conversion
Teacher Observations	no maximum number specified	maximum of 2 for tenured teachers; 3 for teachers who are evaluated less than satisfactory
Criteria for Voluntary Transfers	certification status, 10 year, seniority, satisfactory evaluation, professional qualification and competence, proximity to place of residence, racial balance, other relevant factors	seniority
Grievance Procedure	4 steps within a maximum of 53 days	5 steps within a maximum of 117 days
Use of Second-Class Certificate	yes	no

We would also note regarding the Prince George's County Educators' Association Negotiated Agreement that the State Board of Education found that the October 15 deadline for effectuating involuntary transfers had a substantive effect inconsistent with the broad statutory authority vested in a local superintendent under § 6-201 (b) of the Education Article to transfer personnel as the needs of the system require. The State Board therefore invalidated that specific provision. See PGCEA vs. Board of Education of P.G. County, Opinion No. 95-31 (issued on December 5, 1995).

5. FISCAL CONDITION OF PRINCE GEORGE'S COUNTY SCHOOLS

The Department of Legislative Services will be responding to questions a - c:

a. **Provide a summary of current operating aid and recent aid trends involving State aid to Prince George's County Public Schools. What are the projected state aid increases in the future?**

b. **How do Prince George's County Public Schools compare from a statewide perspective on such indicators as per pupil expenditures, teacher and administrator compensation, and school-by-school operating budgets?**

c. **How do Prince George's County Public Schools teacher-student ratios compare to other subdivisions?**

d. **How strong are the school system's internal fiscal controls and fiscal accountability indicators?**

Internal Fiscal Controls

In accordance with Section 5-109 of the Education Article of the Annotated Code of Maryland, each county school board shall provide for an annual audit of its financial transactions and accounts to be performed by an independent CPA firm. A review of the audited financial statements and related reports of the Prince George's County Board of Education (Prince George's County Board of Education) for fiscal years 1992 through 1996 did not reveal any material weaknesses in internal control.

In conjunction with the issuance of the audit report, the auditors also issued a report entitled *Business Improvement Opportunities* for each fiscal year. MSDE received these reports for fiscal years 1993 through 1996; the Board did not forward the 1992 report citing proprietary concerns.

The reports for fiscal years 1993, 1994, and 1995 characterized the quality of the Board's financial internal control structure in an introductory paragraph as "adequate", "sound", and "relatively strong", respectively. The 1996 report did not include an introductory paragraph and did not specifically comment upon the quality of the financial internal control structure. The reports for 1993 through 1995 stated that "there are always opportunities to enhance any internal control structure, or improve operating procedures and efficiencies" and identified 8 such opportunities in 1993, 2 in 1994, and 1 in 1995. The 1996 report identified 5 items for improvement, including a recommendation that procedures be developed to update the payroll master file when employees are terminated. This Department attempted to determine the current status of the payroll item by referring to the auditor's 1997 *Business Improvement Opportunities* report. However, we were advised that the 1997 report was not yet available for release. Alternatively, we were provided with a copy of a special report prepared by the auditors in response to certain allegations regarding payroll. However, that report did not express an opinion on the Board's internal controls. Therefore, we will withhold comment on the current adequacy of internal controls until we have had the opportunity to review the auditor's 1997 report.

Fiscal Accountability

The Prince George's County Board of Education is fiscally accountable to Prince George's County, the State of Maryland, and the public.

Accountability to Prince George's County:
The Prince George's County Board of Education is a component unit of Prince George's County for financial reporting. The County Council of Prince George's County is responsible for approving the Board's budget and establishing spending limitations. Transfers of funds among expenditure categories must be approved by the County Council. Additionally, Section 5-105 of the Education Article, as amended by House Bill 7, provides for the oversight and approval by the county government of expenditures of revenues and transfers within and between major categories. This Section requires the county board of education to submit a report to the county governing body within 15 days after the end of each month, if during that month, the county board takes any action that would commit the county board to spend more for the current fiscal year in any major category than the amount approved in the annual budget for that category. Section 5-113 provides for sanctions for failure to comply with the aforementioned reporting requirements.

Accountability to the State Department of Education:
The Prince George's County Board of Education submits annual financial reports to the State Department of Education in accordance with the provisions and definitions of the *Financial Reporting Manual for Maryland Public Schools*. Additionally, they submit an annual audit of their financial transactions and accounts to the Department. A reconciliation of the annual financial report and the annual audited financial statements is also submitted to the Department.

Accountability to the Public:
Each fiscal year, a report is included as an introduction to the audited financial statements that discusses the financial activities of the Prince George's County Board of Education. The report includes the following topic areas: Economic Condition and Outlook, Major Initiatives, Financial Information (which includes a summary of highlights for the year), Independent Audit Report and Awards. The report is written so that the general public can obtain an understanding of the activities of the Board. The public is also able to attend meetings held by the Prince George's County Board of Education and may provide comments or ask questions related to the issues raised at the prior meeting.

What is the tax effort and level of local support for the Prince George's County Public Schools compared to other subdivisions?

The Department of Legislative Services will be responding to the above question.

6. SCHOOL CONSTRUCTION

Dr. Yale Stenzler, Executive Director of Public School Construction, will be responding to the following questions:

a. What would be the impact of eliminating court-ordered busing on Prince George's County's school construction needs?

b. How much of the County's school construction needs arise from potential end of busing and how much from normal enrollment growth?

c. What is the recent history of Prince George's County school construction funding and the status of current and projected school construction funding?

d. What is MSDE's analysis of the County school board's current enrollment projections and school construction program?

e. How does the use of Milliken and magnet schools affect the County's own projected school construction needs?

f. What will be the impact on the Prince George's County budget of this projected school construction program?

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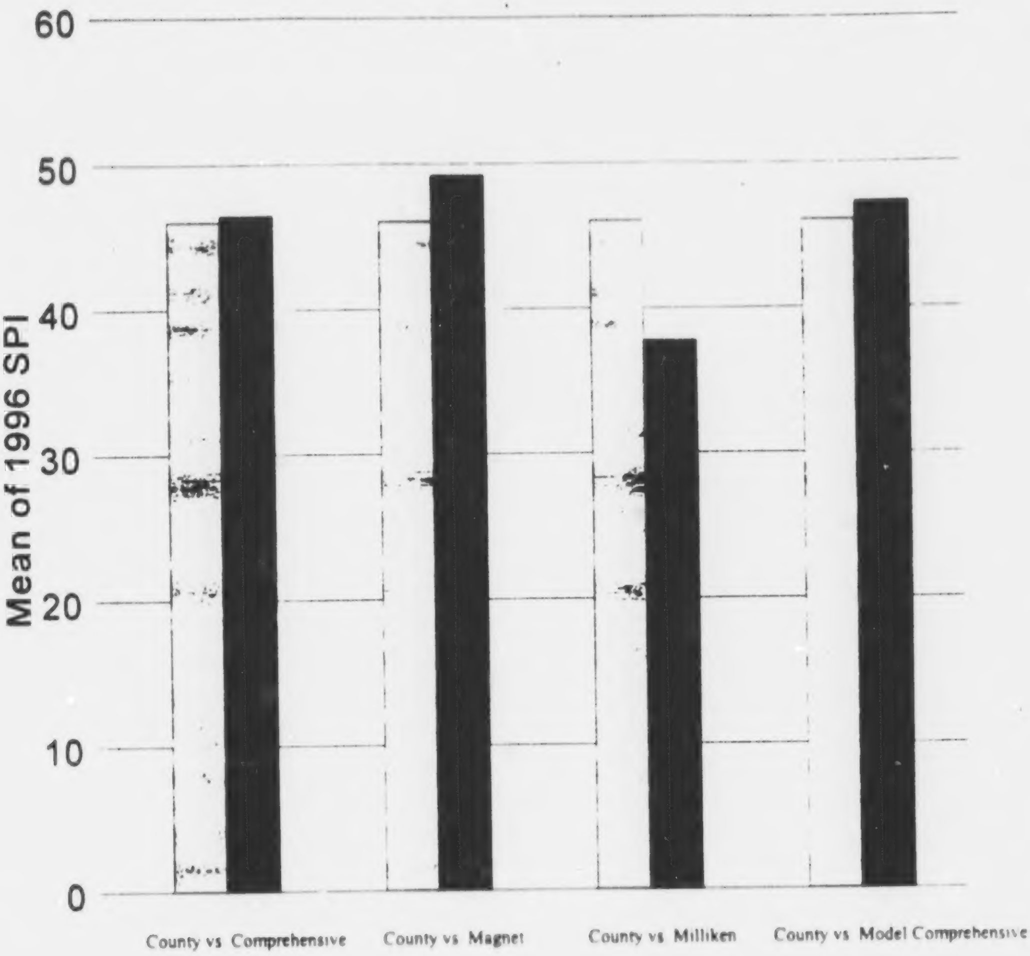
Exhibit 1
Prince George's - Elementary Level
Comparison between County's Mean and Special Schools' Mean
1996 SPI



Note: 46.05 is the 1996 SPI mean for all schools at the elementary level.

Total Number of Schools at Elementary Level = 122

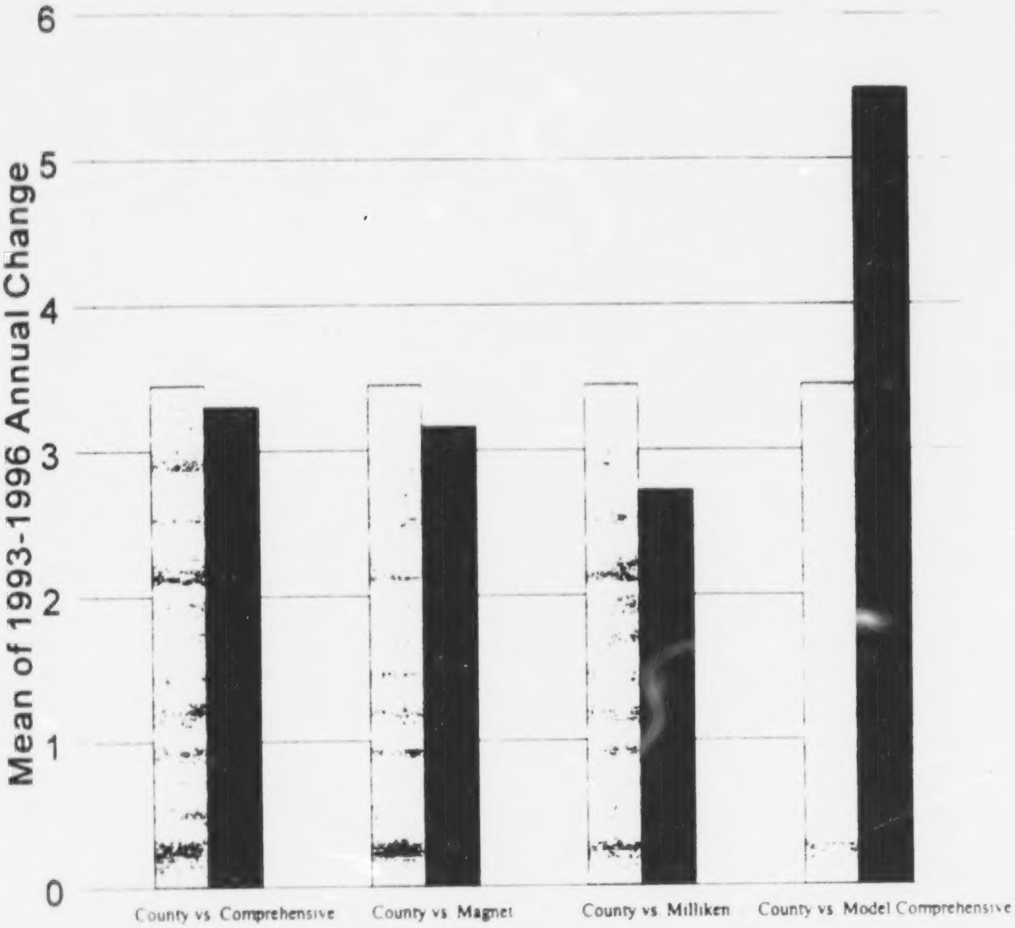
Number of Comprehensive Schools at Elementary Level = 64

Number of Magnet Schools at Elementary Level = 28

Number of Miliken Schools at Elementary Level = 18

Number of Model Comprehensive Schools at Elementary Level = 12

Exhibit 2
Prince George's - Elementary Level
Comparison on 1993-1996 SPI Average Annual Change
Between County and Special Schools



Note: 3.45 is the 1993-1996 annual change for all schools at the elementary level.

Total Number of Schools at Elementary Level = 118

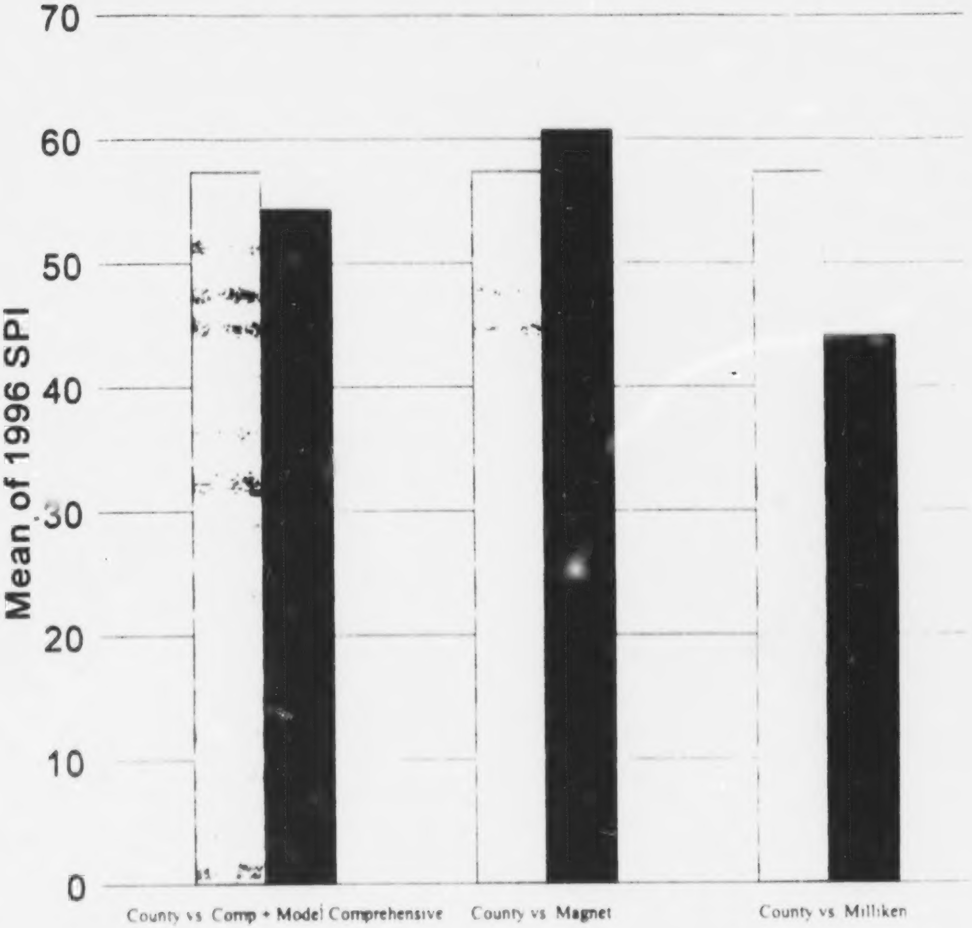
Number of Comprehensive Schools at Elementary Level = 60

Number of Magnet Schools at Elementary Level = 28

Number of Miliken Schools at Elementary Level = 18

Number of Model Comprehensive Schools at Elementary Level = 12

Exhibit 3
Prince George's - Middle School Level
Comparison between County's Mean and Special Schools' Mean
1996 SPI



Note: 57.36 is the 1996 SPI mean for all schools at the middle school level.

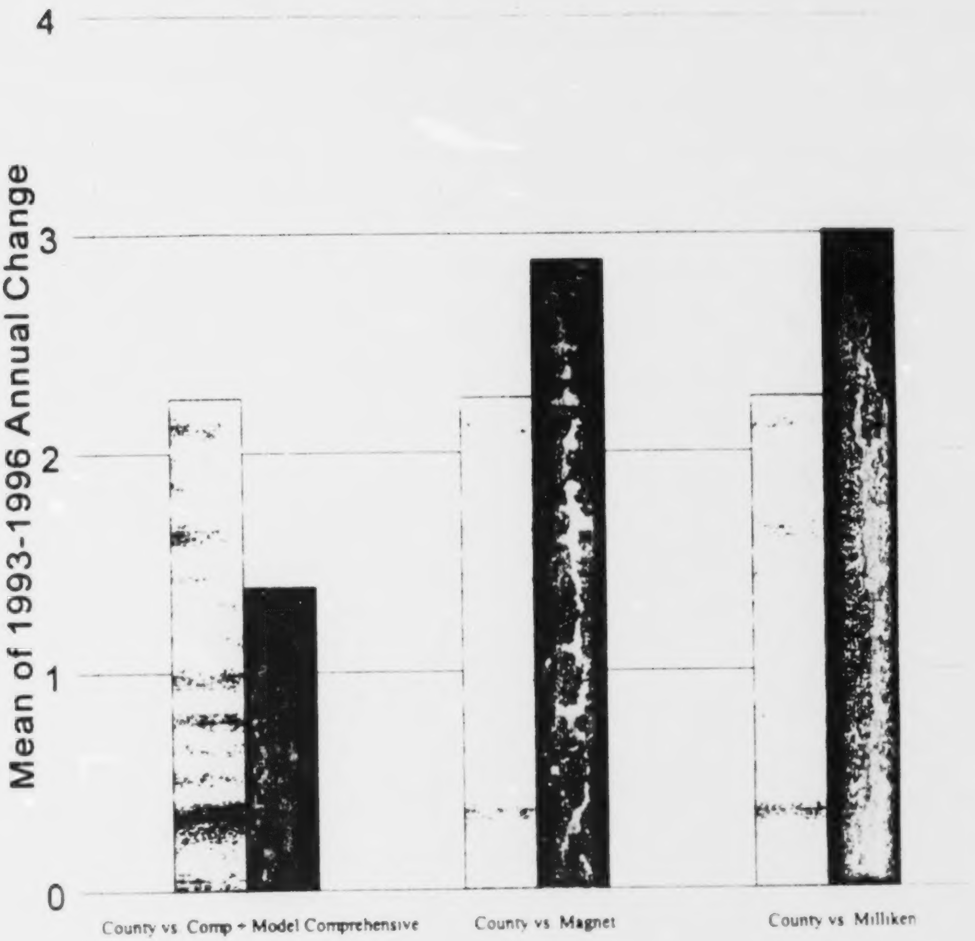
Total Number of Schools at Middle School Level = 26

Number of Comprehensive and Model Comprehensive Schools at Middle School Level = 11

Number of Magnet Schools at Middle School Level = 14

Number of Miliken Schools at Middle School Level = 1

Exhibit 4
Prince George's - Middle School Level
Comparison on 1993-1996 SPI Average Annual Change
Between County and Special Schools



Note: 2.25 is the mean of 1993-1996 annual change for all schools at the middel school level

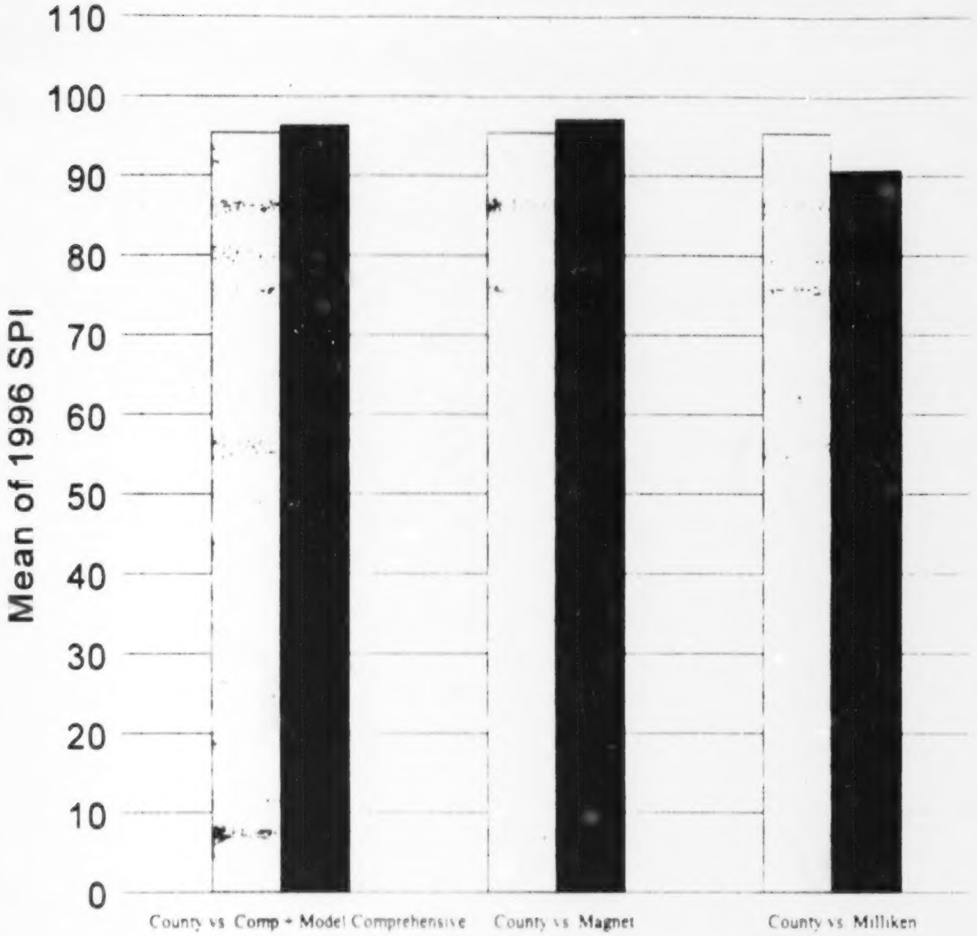
Total Number of Schools at Middle School Level = 26

Number of Comprehensive and Model Comprehensive Schools at Middle School Level = 11

Number of Magnet Schools at Middle School Level = 14

Number of Miliken Schools at Middle School Level = 1

Exhibit 5
Prince George's - High School Level
Comparison between County's Mean and Special Schools' Mean
1996 SPI



Note: 95.42 is the 1996 SPI mean for all schools at the high school level.

Total Number of Schools at High School Level = 22

Number of Comprehensive and Model Comprehenive Schools at High School Level = 5

Number of Magnet Schools at High School Level = 10

Number of Miliken Schools at High School Level = 5

Exhibit 6

Definition of School Classifications based on Programs

Magnet Schools--Offer unique educational programs with special programmatic focus. Schools selected on basis of projected African American enrollment of 80% or more.

Milliken II Schools--Designated due to limited integration to receive additional staffing and enriched resources for students to enhance the quality of instruction and the potential for achievement among all students attending the Schools.

Model Comprehensive Schools--Student enrollments more recently exceeded the court established racial composition guidelines receive additional instructional resources. Successful learning models developed in these Schools through resources provided under this program provide a framework for improving student achievement in all comprehensive Schools.

Comprehensive Schools--The local Schools that most of the system's students attend. These Schools offer a comprehensive school program, including basic skills as well as essential skill development necessary for problem solving and critical thinking.

BULLETIN

PRINCE GEORGE'S COUNTY PUBLIC SCHOOLS

P-11-97
Originators Serial No.
January 6, 1997
Date
Personnel
Originating Office
June 30, 1997
Cancellation Date

TO: All Principals and Supervisors

FROM: Chief Divisional Administrator for Personnel

RE: **Evaluation of Teacher Performance**
TENURED AND NON-TENURED (Probationary)

1. **PURPOSE**: To provide directions for the evaluation of teachers.

2. **INFORMATION**: Please follow these procedures for the evaluation of all teachers.

   A. Principals are to furnish evaluation forms to each teacher at the beginning of the school term or whenever the teacher begins service.

   B. A final (end of school term) evaluation form is to be completed and submitted for all teachers who were in your school on September 30, even if they subsequently resigned, are on sick leave (Sick Leave Bank included) or, are on any other type of leave-of-absence without pay, and as a result, not present in your school when the final evaluation process is scheduled to commence.

   C. **ALL** evaluations are to be **complete** at the time you discuss the evaluation with the teacher. The teacher is to sign the evaluation in your presence and be given a copy of the evaluation immediately thereafter. (A teacher's signature on the evaluation form merely acknowledges receipt and does not indicate agreement with its contents).

   D. Evaluations which conclude a teacher to be **satisfactory** in all respects must be given no later than your teacher's last duty day.

   E. **INTERIM EVALUATION**: Whenever it appears that any aspect of one of your **tenured** teacher's classroom performance is judged to be **less than satisfactory** (at least one (1) "Needs to Improve" or one (1) "Unsatisfactory"), you must notify the teacher in writing and shall follow this notification with a conference to suggest necessary improvement. If your writing is on a Teacher Evaluation form, then make certain you mark such form "Interim" in the upper right hand corner.

G. ADDITIONAL SPECIAL PROVISIONS FOR NON-TENURED (PROBATIONARY) TEACHERS

1) each such teacher shall be observed periodically **at least four (4) times** during the school year.

When the teacher is assigned to your school at the beginning of a school year, every effort should be made to allow for a reasonable time span intervening such observation, so that your teacher may have the opportunity to correct any teaching deficiencies that a prior observation may have reflected.

2) The teacher shall be observed by more than one (1) qualified person each year, i.e., you and some other person so designated for such purpose by the Superintendent of Schools.

One of such observations shall be announced to your teacher in writing at least two (2) days in advance.

3) Within a reasonable time subsequent to each observation, the observer must hold a conference with the teacher at which time a written report shall be submitted. The report should include, where appropriate, favorable comments, criticisms and specific recommendations for improvement.

4) **At least once each semester a formal evaluation, including a conference, shall be made on the regular evaluation form.**

5) This evaluation will be based on the conclusions and assessments reached by you and at least one other person designated for such purpose by the Superintendent of Schools.

6) If any of these evaluations shows any element of teacher performance to be "**Unsatisfactory**", you are to forward a copy to your Chief Educational Administrator immediately following your teacher receiving a copy of same.

7) **Your Chief Educational Administrator will advise you annually of the final date by which you must identify any one of your non-tenured (probationary) teachers, whose contract non-renewal may be in the best interest of the Prince George's County Public Schools.**

H. If, at any time during the school year, it appears that any of your tenured or **non-tenured (probationary)** teachers' classroom performance or other aspects of conduct continues to need improvement or be unsatisfactory, you are urged to immediately discuss this fact with your Chief Educational Administrator, who

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PRINCE GEORGE'S COUNTY PUBLIC SCHOOLS
Upper Marlboro, Maryland 20772

Teacher Evaluation

Teacher's Name ______________________ Social Security Number ______________________

Name of School ______________________ School Year ______________________

Most Recent Date of Hire ______________________ Assignment ______________________

Satis-factory	* Needs to Improve	Unsatis-factory	RATING ELEMENTS
			I. Effective Teaching Preparation
			A. Planning and Preparation
			Implements lessons which provide for instruction of students at appropriate achievement levels, and reflects an appropriate sequencing of instruction, based on approved curricular objectives.
			B. Learning Climate
			1. Creates a classroom climate that is warm and inviting. Promotes the development of positive self concept for all students.
			2. Involves students at all instructional levels in each lesson and encourages and receives inquiries, ideas and opinions that relate to those lessons from the students involved.
			3. Presents lessons in such a way as to encourage students to employ higher order critical thinking skills.
			4. Demonstrates fairness and consistency in the handling of student discipline.
			C. Instruction
			1. Demonstrates knowledge of subject matter and transmits that knowledge in an interesting manner using a variety of techniques and/or materials to accomplish the objectives of instruction.
			2. Maximizes the use of time for instructional purposes, with all students being involved in meaningful learning activities.
			3. Uses a wide range of assessment information (including but not limited to observations by the teacher, CRT, etc.) to regularly adjust student instruction.
			4. Makes clear the purpose and/or practical importance of the lesson and how the content of the homework assignment relates to that lesson.
			5. Provides prompt and appropriate feedback on work completed by students.
			6. Demonstrates a keen understanding of the needs, concerns, abilities and interest of each student in such a manner that leads to the delivery of needed instructional or other resources.
			7. Performs so that there is observable satisfactory growth in children.

White Copy to Chief Divisional Administrator, Personnel — Canary Copy to Chief Educational Administrator/Principal — Pink Copy to Principal (if appropriate) — Gold Copy to Teacher

ER-06 7/95
PGIN 7540-9014

*This rating option may be used for interim evaluations only.

Teacher's Name ______________________ Social Security Number ______________ School Year ______________

Satis-factory	*Needs to Improve	Unsatis-factory	RATING ELEMENTS
			II. Professionalism
			A. Uses current curricular and instructional practices which relate to effective education.
			B. Actively participates in program improvement activities.
			C. Works cooperatively as an effective team member to achieve school goals and objectives.
			D. Demonstrates accuracy in record keeping and promptness in meeting deadlines.
			E. Demonstrates punctuality at post of duty.
			F. Follows established school policies and procedures.
			G. Demonstrates effective oral and written communication skills.
			H. Relates without difficulty to staff members and parents.

Achieved	Not Achieved	III. Achievement Outcome
		Shows significant and demonstrable progress on the part of students as defined by the goals developed by the principal and/or designated administrators and the teacher.

IV. Overall Rating

SATISFACTORY ☐ UNSATISFACTORY ☐

Comments: ____

____

____

____

____

____

____

Reassign ☐ Transfer: Teacher's Request ☐ Principal's Request ☐

______________________ Principal's Signature ______________ Date

I have received a copy of this Evaluation: ______________________ Teacher's Signature ______________ Date

IF I DO NOT AGREE WITH THIS EVALUATION, I UNDERSTAND THAT I MAY SUBMIT A LETTER TO THE CHIEF DIVISIONAL ADMINISTRATOR, PERSONNEL TO BE PLACED IN MY PERSONNEL FOLDER WITH COPIES TO THE CHIEF EDUCATIONAL ADMINISTRATOR/PRINCIPAL OR PRINCIPAL, AS APPROPRIATE.

*This rating option may be used for interim evaluations only.

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Comparison of Provisional Teachers in Prince George's County with other Maryland Subdivisions

Local School System	**Number**	**% of Teachers**
Allegany	6	0.87
Anne Arundel	54	1.30
Baltimore City	440	7.00
Baltimore County	103	1.57
Calvert	10	1.35
Caroline	4	1.30
Carroll	16	1.11
Cecil	11	1.22
Charles	42	3.60
Dorchester	7	2.25
Frederick	38	1.84
Garrett	4	1.08
Harford	23	1.01
Howard	49	1.94
Kent	1	0.55
Montgomery	107	1.44
Prince George's	**900**	**12.80**
Queen Anne's	8	2.17
St. Mary's	28	3.24
Somerset	7	3.26
Talbot	7	2.58
Washington	11	0.89
Wicomico	8	0.80
Worcester	3	0.71

Prince George's County Public Schools Teachers - Certification

School	Level	Total Instructional Staff	Provisional Teachers	% of Staff with Prov Cert
Adelphi	Elem	36	1	2.78%
Allenwood	Elem	25	0	0.00%
Apple Grove	Elem	32	4	12.50%
Ardmore	Elem	33	3	9.09%
Arrowhead	Elem	38	5	13.16%
Avalon	Elem	27	5	18.52%
Baden	Elem	22	2	9.09%
Barnaby Manor	Elem	45	3	6.67%
Beacon Heights	Elem	24	5	20.83%
Beltsville	Elem	45	0	0.00%
Benjamin Foulois	Elem	48	3	6.25%
Berkshire	Elem	32	2	6.25%
Bladensburg	Elem	48	4	8.33%
Bond Mill	Elem	30	0	0.00%
Bradbury Heights	Elem	50	5	10.00%
Brandywine	Elem	26	1	3.85%
Calverton	Elem	39	3	7.69%
Capitol Heights	Elem	24	5	20.83%
Carmody Hills	Elem	38	4	10.53%
Carole Highlands	Elem	35	3	8.57%
Carrollton	Elem	36	2	5.56%
Catherine T Reed	Elem	40	1	2.50%
Cherokee Lane	Elem	33	0	0.00%
Chillum	Elem	32	4	12.50%
Clinton Grove	Elem	31	1	3.23%
Columbia Park	Elem	34	2	5.88%
Concord	Elem	28	4	14.29%
Cool Spring	Elem	42	1	2.38%
Cooper Lane	Elem	28	1	3.57%
Deerfield Run	Elem	36	2	5.56%
District Heights	Elem	30	0	0.00%
Dodge Park	Elem	38	1	2.63%
Doswell Brooks	Elem	40	4	10.00%
Edgar Allen Poe	Elem	20	1	5.00%
Flintstone	Elem	32	5	15.63%
Forest Heights	Elem	23	1	4.35%
Fort Foote	Elem	27	5	18.52%
Fort Washington Forest	Elem	26	0	0.00%
Francis T. Evans	Elem	29	0	0.00%
Gaywood	Elem	36	0	0.00%
Gladys Noon Spellman	Elem	44	1	2.27%
Glassmanor	Elem	27	1	3.70%
Glenarden Woods	Elem	33	2	6.06%
Glenn Dale	Elem	26	1	3.85%
Glenridge	Elem	54	1	1.85%
Green Valley	Elem	28	3	10.71%
Greenbelt	Elem	47	5	10.64%
Heather Hills	Elem	24	0	0.00%
Henry Ferguson	Elem	27	0	0.00%

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Prince George's County Public Schools Teachers - Certification

School	Level	Total Instructional Staff	Provisional Teachers	% of Staff with Prov Cert
High Bridge	Elem	32	0	0.00%
Hillcrest Heights	Elem	29	2	6.90%
Hollywood	Elem	24	0	0.00%
Hyattsville	Elem	31	1	3.23%
Indian Queen	Elem	16	2	12.50%
J Frank Dent	Elem	24	3	12.50%
James Harrison	Elem	35	4	11.43%
James McHenry	Elem	35	6	17.14%
James Ryder Randall	Elem	63	3	4.76%
John Carroll	Elem	31	0	0.00%
John Eager Howard	Elem	22	3	13.64%
John H Bayne	Elem	31	0	0.00%
Kenilworth	Elem	34	1	2.94%
Kenmoor	Elem	24	1	4.17%
Kettering	Elem	43	3	6.98%
Kingsford	Elem	49	1	2.04%
Lamont	Elem	37	1	2.70%
Langley Park/McCormick	Elem	41	2	4.88%
Laurel	Elem	26	0	0.00%
Lewisdale	Elem	36	3	8.33%
Longfields	Elem	36	5	13.89%
Lyndon Hill	Elem	27	3	11.11%
Magnolia	Elem	30	2	6.67%
Marlton	Elem	33	0	0.00%
Mattaponi	Elem	30	1	3.33%
Matthew Henson	Elem	33	4	12.12%
Melwood	Elem	32	2	6.25%
Middleton Valley	Elem	29	3	10.34%
Montpelier	Elem	26	0	0.00%
Morningside	Elem	38	6	15.79%
Mt Rainier	Elem	27	1	3.70%
North Forestville	Elem	32	5	15.63%
Oakcrest	Elem	28	4	14.29%
Oaklands	Elem	25	1	4.00%
Overlook	Elem	42	4	9.52%
Owens Road	Elem	18	2	11.11%
Oxon Hill	Elem	37	1	2.70%
Paint Branch	Elem	24	0	0.00%
Panorama	Elem	22	0	0.00%
Patuxent	Elem	29	3	10.34%
PE Williams	Elem	44	0	0.00%
Pointer Ridge	Elem	38	0	0.00%
Potomac Landing	Elem	27	3	11.11%
Princeton	Elem	27	0	0.00%
Ridgecrest	Elem	46	5	10.87%
Riverdale	Elem	47	7	14.89%
Robert Frost	Elem	24	0	0.00%
Rockledge	Elem	30	1	3.33%
Rogers Heights	Elem	45	10	22.22%

Prince George's County Public Schools Teachers - Certification

School	Level	Total Instructional Staff	Provisional Teachers	% of Staff with Prov Cert
Rose Valley	Elem	29	3	10.34%
Samuel Chase	Elem	27	2	7.41%
Samuel Ogle	Elem	43	0	0.00%
Scotchtown Hills	Elem	31	0	0.00%
Seabrook	Elem	30	1	3.33%
Seat Pleasant	Elem	33	3	9.09%
Shadyside	Elem	34	9	26.47%
Skyline	Elem	23	1	4.35%
Springhill Lake	Elem	53	5	9.43%
Tayac	Elem	40	3	7.50%
Templeton	Elem	43	3	6.98%
Thomas Claggett	Elem	37	1	2.70%
Thomas Stone	Elem	53	3	5.66%
Tulip Grove	Elem	32	2	6.25%
University Park	Elem	37	0	0.00%
Valley View	Elem	31	0	0.00%
Waldon Woods	Elem	24	0	0.00%
William Beanes	Elem	39	1	2.56%
William Paca	Elem	32	1	3.13%
Woodmore	Elem	34	2	5.88%
Woodridge	Elem	22	1	4.55%
Yorktown	Elem	30	1	3.33%
C Eliz Rieg	Spec Cntr	19	2	10.53%
Chapel Forge	Spec Cntr	56	3	5.36%
Frances Fuchs	Spec Cntr	49	2	4.08%
H Winship Wheatley	Spec Cntr	64	2	3.13%
Hillcrest Heights	Spec Cntr	17	1	5.88%
James Duckworth	Spec Cntr	22	2	9.09%
Margaret Brent	Spec Cntr	13	1	7.69%
RICA	Spec Cntr	20	2	10.00%
Tanglewood	Spec Cntr	20	3	15.00%
Andrew Jackson	Middle	49	8	6.33%
Benjamin Stoddert	Middle	49	9	18.37%
Benjamin Tasker	Middle	59	3	5.08%
Buck Lodge	Middle	74	6	8.11%
Charles Carroll	Middle	43	2	4.65%
DD Eisenhower	Middle	53	2	3.77%
Drew Freeman	Middle	45	11	24.44%
Eugene Burroughs	Middle	42	2	4.76%
G Gardner Shugart	Middle	41	7	17.07%
Greenbelt	Middle	36	0	0.00%
Gwynn Park	Middle	36	1	2.78%
Hyattsville	Middle	43	2	4.65%
James Madison	Middle	58	8	13.79%
Kenmoor	Middle	50	6	12.00%
Kettering	Middle	76	18	23.68%
Lord Baltimore	Middle	47	9	19.15%
Martin Luther King Jr	Middle	48	1	2.08%
Nicholas Orem	Middle	46	5	10.87%

Prince George's County Public Schools Teachers - Certification

School	Level	Total Instructional Staff	Provisional Teachers	% of Staff with Prov Cert
Oxon Hill	Middle	46	5	10.87%
Robert Goddard	Middle	52	10	19.23%
Stephen Decatur	Middle	54	12	22.22%
Thomas Johnson	Middle	52	5	9.62%
Thomas Pullen	Middle	56	7	12.50%
Thurgood Marshall	Middle	56	8	14.29%
Walker Mill	Middle	36	5	13.89%
William Wirt	Middle	52	6	11.54%
Bladensburg	High	89	8	8.99%
Bowie	High	134	18	13.43%
Central	High	79	11	13.92%
Croom	High	21	1	4.76%
Crossland	High	91	11	12.09%
Duval	High	87	7	8.05%
Eleanor Roosevelt	High	156	6	3.85%
Fairmont Heights	High	58	9	15.52%
Forestville	High	79	8	10.13%
Frederick Douglass	High	81	2	2.47%
Friendly	High	88	12	13.64%
Gwynn Park	High	76	8	10.53%
High Point	High	133	7	5.26%
John Hanson	High	5	0	0.00%
Largo	High	114	21	18.42%
Laurel	High	109	1	0.92%
Northwestern	High	130	14	10.77%
Oxon Hill	High	107	9	8.41%
Parkdale	High	117	11	9.40%
Potomac	High	94	17	18.09%
Suitland	High	183	32	17.49%
Surrattsville	High	69	10	14.49%
Tall Oaks	High	24	4	16.67%
		7699	661	8.59%

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Attachment D

Maryland State Department of
EDUCATION

Schools for Success

Nancy S. Grasmick
State Superintendent of Schools

200 West Baltimore Street
Baltimore, Maryland 21201
Phone (410) 333-2000
TTY/TDD (410) 333-6442

May 12, 1993

Dr. Walter G. Amprey
Superintendent of Public Instruction
Baltimore City Public Schools
200 East North Avenue
Baltimore, Maryland 21202

Re: Negotiated Agreement Provisions and Board Policy Concerns

Dear Dr. Walter Amprey:

As you know, the Maryland General Assembly budget committees expressed concern over the management of the Baltimore City Public School System and directed the Maryland State Department of Education to monitor the City School System's efforts in management reform. It is with this directive in mind that I raise the following issues with respect to provisions in the collective bargaining agreements of the Baltimore City Public Schools as compared, for example, to provisions in Anne Arundel, Howard, Montgomery, Prince George's, and Baltimore County agreements. While it is your system and your prerogative to make such agreements as you deem prudent, it would be helpful to us in preparing our report to the General Assembly to understand your system's reasons for agreeing to the following provisions.

On the length of the school day, Anne Arundel and Howard County teachers are required to work the longest day (7 hours 35 minutes) while Baltimore City teachers are required to work the shortest day (6 hours 50 minutes). In Baltimore City, teachers are required to work 185 days of the 190 maximum, while in Baltimore County teachers are required to work 187 out of a maximum of 191.

Of the three districts in which the union agreement dictates the maximum course load, Baltimore City has the smallest course load maximum. It is only in Baltimore City that the union agreement prohibits schools from assigning teachers non-instructional duties as needed and on a rotating, equitable basis during the regular work day. The Baltimore City agreement is also the only one that prohibits teachers from attending any

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after-school faculty meetings. Furthermore, Baltimore City allows its counselors, social workers, and librarians to work the same hours as teachers. These professionals therefore leave the school building almost immediately after the end of the instructional day thereby denying access to students who need their services. This is especially troubling because these professionals have no papers to grade or instructional plans to prepare.

In comparing sick leave, I note that most teachers in Maryland are given ten sick days each year. However, fifteen days are given to all Baltimore City teachers. Also, the Baltimore City School System allows sick leave days to be converted into personal leave days.

For the public school administrators and supervisors, Baltimore City is extremely generous with its leave provisions. It is among the most liberal in the number of annual leave days granted and allowed to be carried forward (24 annual leave days per year with 82 maximum accrual). In addition, Baltimore City grants all PSASA employees nonoperational days that include all holidays and winter, mid-winter, and spring vacation periods.

On teacher observations, only the Baltimore City agreement sets a cap on the number of observations permitted. Only Baltimore City and Anne Arundel County require an additional third observation for teachers who are to be given less than satisfactory ratings. Only Montgomery County and the Baltimore City agreements refer to the teacher evaluation procedure and require the respective administrations to consult with the union before making any alterations. While the Montgomery County agreement clearly states that the school board can unilaterally change the evaluation document after consultation with the union, the Baltimore City contract does not.

On voluntary transfer requests, it is only in Baltimore City that seniority is the sole consideration allowed by the union agreement in determining which teachers will be reassigned. In comparing the grievance procedures, Baltimore City has the most number of steps and the longest number of days permitted between steps. In fact, in Baltimore City it appears that the process may take up much of a school year and require formal action by the school board.

Finally, in addition to reviewing the union agreements, it has come to my attention that there are policies that have been adopted by the Board of School Commissioners for Baltimore City that go beyond the requirements of the union agreement and beyond the requirements of State law. I urge you to ask your board to consider the following:

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- No longer require a third-party observation for less than satisfactory evaluations
- Begin using second-class certificates for teachers receiving less than satisfactory evaluations
- Remove incompetent teachers after one year of poor performance
- Move the transfer request deadline up to March 1 or earlier
- Change the evaluation deadline for sub-par teachers to the end of the school year
- Increase the work year up to 190 days.

I would appreciate your full consideration of these issues as we move forward toward making all of our public schools model learning environments.

Sincerely,

Nancy S. Grasmick
State Superintendent of Schools

NSG/VVC86/tlw

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J. Joseph Curran, Jr.
Attorney General

(410) 576-7003

Telecopier No.

Carmen M. Shepard
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Deputy Attorneys General

(410) 576-6300

Writer's Direct Dial No.

State of Maryland
OFFICE OF THE ATTORNEY GENERAL

September 22, 1997

The Honorable Howard P. Rawlings
House of Delegates
3502 Sequoia Avenue
Baltimore, MD 21215-7211

Dear Del. Rawlings:

Attorney General Curran asked me, as the attorney of record in the Prince George's County desegregation case, to respond to your letter of August 22, 1997. First, let me apologize for the delay in responding to your letter. With trial scheduled to begin in November in Vaughns, et al. v. Board of Education of Prince George's County, et al., PJM-72-325, your questions are timely, and I will attempt to address each of them fully, as follows:

Please describe the issues surrounding court-ordered busing in Prince George's County.

In 1971, the NAACP brought suit in the federal district court for Baltimore on behalf of African-American schoolchildren in the Prince George's County Public Schools ("PGCPS"), alleging that PGCPS was racially segregated in violation of the Equal Protection Clause of the Fourteenth Amendment of the federal Constitution. In 1972, the court held that PGCPS schools were unconstitutionally segregated and issued a series of orders intended to remedy that situation, including significant student reassignment and busing throughout the county. In particular, the court set certain goals for the racial composition of PGCPS schools, and students were reassigned and bused in order to meet those goals.

The achievement of those goals has been impeded by demographic trends in the school system. The numbers of white students in the school system have steadily and substantially decreased over the last twenty years, while the African-American student population has increased dramatically. Thus, while the school population was 73.5%

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white and 24.9% African-American in 1972, PGCPS's student body was 18.6 % white and 71.8% African-American in 1996.

The court's remedial orders were re-visited in the early 1980s, when plaintiffs alleged that PGCPS was in violation of the busing orders, and PGCPS contended that it had met its constitutional obligations. In 1985, the parties ultimately resolved these disputes with an agreed-upon plan for the establishment of magnet and "Milliken II" schools and other measures intended to update the original court orders and reflect changing demographic trends. In addition, mandatory student reassignment and busing were augmented by the reassignment of students to voluntarily selected magnet programs and by replacing efforts to desegregate the Milliken II schools with enhanced programs and funding for those programs. The court's desegregation goals were adjusted downward to reflect demographic realities.

The latest phase of these proceedings was initiated on July 1, 1996, when plaintiffs filed a Motion for Scheduling Order in response to media reports that for the upcoming school year the Board intended to admit students to Prince George's County magnet school programs outside of the racial admission guidelines that govern magnet school admissions under this Court's desegregation orders. In response to the motion and in light of the enormous demographic shifts in Prince George's County, more than twenty years of court-ordered desegregation efforts by the school system and significant recent guidance from the Supreme Court regarding the termination of desegregation court orders, Judge Messitte ordered a comprehensive review of the desegregation initiative in Prince George's County on August 9, 1996.

What is the legal status of the lawsuits? Has a trial been scheduled? If so, what is the trial date.

PGCPS remains under court order to enforce all of the provisions of the desegregation decrees existing in this case. However, the district court last summer initiated its review of the status of the case, leading to the appointment of an expert panel to examine PGCPS' efforts and progress in eliminating the vestiges of prior racial discrimination. Prince George's County became a party in the case and filed a Motion for a Declaration of Unitary Status, Dissolution of All Injunctions and Dismissal of Action. Essentially, the County seeks to terminate all court involvement in PGCPS. The Prince George's County Board of Education, however, filed a motion seeking partial unitary status and to modify existing court orders. The Board seeks to have continuing court jurisdiction and, specifically, seeks an order from the court requiring the State and the County to provide the funding necessary to implement the Six-Year plan.

The expert panel has completed its work, and a copy of the executive summary of its report and the full report itself will be provided to you. Briefly, the experts concluded that the school system had met court-ordered requirements in most respects and that, where the school system may have failed to do so, it appeared that additional efforts would not materially aid in further desegregation of PGCPS schools.

A trial to determine whether continued court supervision is proper and, if so, what the continuing desegregation order should consist of, has been scheduled to begin on November 17, 1997. It is expected to last approximately 3 weeks.

What are the issues that will be the subject of the trial? Is it a jury trial?

The fundamental issue in the November non-jury trial will be whether PGCPS has achieved "unitary status," i.e., whether it has eliminated the vestiges of past discrimination to the extent practicable. If the court concludes that the system is now unitary, then existing desegregation orders will be terminated and the court's oversight of PGCPS's desegregation efforts will cease. This is the outcome sought by the County.

The court alternatively could find that the school system simply has not achieved unitary status, adopting plaintiffs' position, or that it has achieved partial unitary status, as PGCPS has urged. When reviewing a school system's desegregation efforts, courts must consider a series of factors, including student assignments, staff assignments, transportation, facilities, extracurricular activities and educational programs. A court may determine that the school system has achieved unitary status with respect to some of those factors, and withdraw its jurisdiction as to those factors while retaining supervision of the others for which unitary status has not been reached.

If the court holds that PGCPS has not achieved unitary status or has reached only partial unitary status, then it will also have to order an appropriate remedy. In this situation, the court would consider the extent to which existing court orders should be maintained, modified or even expanded in order to effectively eliminate the remaining vestiges of discrimination. Any such remedy could impose programmatic and financial requirements on any of the defendants in the case.

Who are the parties to the litigation? Is the State (an agency or officials) a party? If not, does the State intend to become a party?

The plaintiffs are a class of African-American schoolchildren in PGCPS, represented by the NAACP and the Lawyers' Committee for Civil Rights Under the Law. The defendants are the Prince George's County Board of Education and various PGCPS officials, and the government of Prince George's County.

The State is not a party to the case, having successfully opposed motions by the local defendants seeking its joinder as a defendant. However, the court also ruled that its denial was without prejudice, and, therefore, leaves the plaintiffs and the local defendants the option of seeking to join the State as a party at a later date. The State has no plans to become a party.

If the State is not a party to the litigation, what is its role in the case? What is the role of Prince George's County government in the litigation?

Since mid-1996, when the district court initiated its comprehensive review of the Vaughns case, the State has participated, through the Attorney General's Office and at the court's specific request, as an observer and informal amicus curia. In its May 6, 1997 Order denying the local defendants' motion to join the State as a defendant, the court noted approvingly that the State had "been accompanying these proceedings as an interested party since last fall and . . . has given every indication that it will continue to do so", and stated that the State would continue "to receive notice and the opportunity to participate in the present proceedings as amici, with the possibility, depending upon the Court's ruling, that Plaintiffs and/or Local Defendants may seek to join the State Defendants at a later time."

Prince George's County, upon its own 1996 initiative, is a formal defendant in the case.

What are the legal obligations of the State and county governments with respect to the litigation?

Because the State was not joined as a party to the Vaughns case, it currently is under no legal obligation arising from the case itself. Thus, the State's legal obligations *vis a vis* PGCPS are limited to those general State responsibilities set forth in federal and State law as to oversight, funding, and regulation, which apply with respect to all of Maryland's school systems.

Because Prince George's County voluntarily became a party to the Vaughns case in mid-1996, it now has assumed the legal obligations of a defendant in a lawsuit: to participate in the litigation, including mounting an active defense of its actions in the upcoming trial; and to subject itself to the remedial powers of the court, including the funding and enforcement of any measures which may be ordered by the court as a result of the November proceeding, as well as the payment of attorneys' fees.

The Prince George's County Public Schools, by virtue of its long-standing status as the defendant in the desegregation case, has been and remains legally obligated to implement all existing court orders, as well as any future relief that may be ordered.

Are the State and Prince George's County governments involved in any settlement negotiations that may have a fiscal impact upon the State or the County?

While I personally believe it would make sense for the parties in this case to enter into settlement negotiations, I am not aware of any efforts to negotiate a resolution. Although the Attorney General's Office represents the State with respect to this case, we have not participated in any settlement negotiations in the Vaughns case, nor have we been asked to participate in such negotiations in the future.

What is the status of busing orders in other jurisdictions? Has the U.S. Supreme Court issued any decisions recently that impact school busing cases? If so, please describe the Court's ruling and its general impact on school busing as a means of desegregation.

Since 1991, the Supreme Court has issued a series of major decisions which define the standard for determining when a school system under a desegregation order has achieved unitary status. In Board of Education of Oklahoma City Public Schools v. Dowell, 111 S.Ct. 630 (1991), the Court emphasized that such court-supervised desegregation remedies are intended to be temporary. It held that federal jurisdiction over school systems should terminate after a school system has made efforts to comply with court orders for a reasonable amount of time and has eliminated the vestiges of past segregation to the extent practicable. In a 1992 opinion regarding desegregation in DeKalb County, Georgia public schools, the Court determined that, as a school system eliminated the vestiges of discrimination in various aspects of its operations, court supervision over those components of the education program should cease, even if the system had not achieved unitary status overall. Freeman v. Pitts, 503 U.S. 467 (1992).

In *Freeman*, the Court reiterated the view that continued, good faith compliance with existing court orders was a significant factor in the determination of when a school system has reached unitary status. Applying these principles more recently, the Court also rejected court ordered desegregative measures to increase teacher salaries and improve educational quality in the Kansas City schools as exceeding the scope of the federal court's remedial powers. *Jenkins v. Missouri*, 115 S.Ct. 2038 (1995).

In the last decade, various school systems under long-standing desegregation orders have sought and achieved declarations of unitary status in recent years. These include the school systems of Norfolk, Virginia, whose unitary status was upheld by the Fourth Circuit Court of Appeals, Riddick v. School Bd. of City of Norfolk, 784 F.2d 521 (4th Cir. 1986), cert. denied, 479 U.S. 938 (1996); and school systems in Fort Worth and Austin, Texas; and Boston, Massachusetts.

What is the status of the six year plan with the Court?

While the district court has been apprised of the existence of the PGCPS "six year plan," the plan has no official status in the lawsuit, nor are we aware that the Court has any specific intentions to use the plan as a basis for analysis or action in the upcoming litigation or other *Vaughns*-related proceedings.

I hope that this information is helpful to you. If you have any further questions regarding the PGCPS school desegregation case, please do not hesitate to ask.

Very truly yours,

Carmen M. Shepard

Carmen M. Shepard
Deputy Attorney General

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June 27, 1997

Judge Peter J. Messitte
United States District Court
Greenbelt, Maryland

Dear Judge Messitte:

The Panel you appointed in December 1996 to review and report to you on the status of desegregation in the Prince George's County Public Schools relevant to Vaughns et al vs. Board of Education et al is pleased to submit its final report. The report has the endorsement of the entire Panel.

With the full cooperation of school system staff in providing data and information, we have conducted such studies of the 14 desegregation-related factors you specified to the extent possible within the limits of time and resources available to us. Most of our work has consisted of analyzing available data. We have also visited more than 50 schools and interviewed many school staff and some community members. We have covered a great deal of ground in a comparatively short time.

We have, to the extent our studies permit, addressed each of the questions you posed to us in your charge. Many of those questions will continue to be explored in the trial that is to follow. We hope we have provided a larger factual base for the discussions and shed light on some controverted matters, as well as helping PGCPS in its efforts.

We have benefited from the reading given a preliminary draft of the report by counsel for each of the parties to the case. We have reviewed each of their points carefully and have incorporated many of their suggestions, though not all, into the final report. We should note that our analyses of three particular matters were incorporated into the report at too late a stage to allow for counsel to comment: the desegregative effect of current busing patterns, special education programs, and standardized test scores.

We are pleased to know that the results of our study will now become available to the public to help shape discussion of this important issue of school desegregation. At your direction, we will not be entering into that discussion, since we may be called on to testify at the ensuing trial. We trust that all who are interested in what we have to say will read our report with careful attention.

The members of the panel thank you for giving us the opportunity to undertake this significant work. We hope we have responded in ways that will be useful to you, the parties in this case and, most importantly, the children of Prince George's County.

Yours truly,

Robert S. Peterkin

Robert E. Shoenberg
Robert E. Shoenberg

Christine Rossell

William T. Tren

EXECUTIVE SUMMARY

REPORT OF THE COURT-APPOINTED PANEL
IN
VAUGHNS ET AL V. PRINCE GEORGE'S COUNTY BOARD OF EDUCATION ET AL

Submitted to Judge Peter J. Messitte
June 30, 1997

I. The Nature of the Report

This panel was appointed pursuant to the Court's determination to "conduct a comprehensive review of court-ordered school desegregation in Prince George's County." In carrying out its role in this review, the Panel was ordered to address four major questions:

- Has there been full and satisfactory compliance with the Court's decrees?
- Is retention of judicial control necessary or practicable to achieve compliance with the decrees in any respect?
- Has the School Board demonstrated a good faith commitment to the whole of the Court's decrees since they were entered?
- Have the vestiges of past discrimination been eliminated to the extent practicable?

The Panel, then, is clearly directed to focus its attention on the extent to which the Prince George's County Public Schools have acted in good faith to eliminate vestiges of prior discrimination and have been successful in their efforts. The panel is not charged with evaluating the general educational effectiveness of the Prince George's County Public Schools (PGCPS).

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Judge Messitte directed the panel to consider 14 specific issues:

A. student assignments
B. faculty hiring/assignments
C. staff hiring/assignments
D. transportation
E. extracurricular activities
F. facilities
G. quality of education being offered to black and white students
H. School Board appointments
I. compensation
J. curriculum
K. school location
L. comparative dropout rates
M. graduation rates
N. scores on standardized tests

The specific studies to be undertaken in exploring each of these issues was left to the Panel's discretion.

II. The Organization of This Report

The report is organized according to the structure of the charge to the Panel in the October 9, 1996 Court Order. The major portion is devoted to analysis of each of the 14 factors. The "Conclusion" is organized according to the four major questions the Panel was asked to address.

III. The Conduct of the Study

A large portion of the study consists of data analysis. All data were supplied by PGCPS. Since the data requested were extensive, often dispersed in various offices, unavailable in the configuration or format requested or simply unavailable, school system staff had to devote a great deal of time to meeting the Panel's requests. They provided extraordinary assistance and supportive cooperation.

The Panel also enjoyed the willing cooperation of dozens of system administrators and school-based personnel. Panel members visited 51 schools, talking and touring the building with the principal, other building administrators, teachers and occasionally parents and students. The members spent many hours in conversation with administrators holding system-wide responsibilities for specific school programs and support services, as well as with Superintendent Jerome Clark and Deputy Superintendents Louise Waynant and Robert Slade. Thus the conclusions are informed not only by statistics but also by extensive and direct contact with people and programs.

The Panel also met with the Board of Education, NAACP leadership and the Community Advisory Committee on Magnet and Compensatory Programs ("Committee of 100").

IV. Brief History of Vaughns v. Board of Education

This brief orientation to the Vaughns case is designed to illuminate the structure and emphases of the Panel's report.

July 1972. U.S. District Court Judge Frank Kaufman finds the Prince George's County Public Schools (PGCPS) to be segregated. Orders PGCPS to institute a program of school boundary changes and busing of students out of their "home" districts in such a way as to eliminate racial segregation and create racial balance in school enrollment. Establishes guidelines for the hiring of African-American faculty members to be reflective of the racial composition of the county and the even distribution of African-American faculty throughout the system.

Fall 1981. PGCPS discontinues a portion of the court-ordered busing. Plaintiffs move to reopen the case, broaden the range of alleged segregation-related issues beyond student assignment and faculty hiring and assignment issues. New issues include under-representation of African-Americans in the Talented and Gifted Program (TAG), overrepresentation of African-Americans in special education programs, disproportionately high numbers of African-American students suspended, and the creation of racially identifiable classrooms.

June 1983. Judge Kaufman finds no intent to discriminate in any of these matters or, where alleged, any vestiges of prior segregation in any of the matters pointed out by the plaintiffs. He does find that the Board's unilateral action to curtail some busing violates earlier court orders. He concludes that the system still is not unitary, citing cancellation of some of the court-ordered busing and continuing high percentages (greater than 80 percent) of African-American students in the same schools that had formerly been entirely African-American. On this basis the Court reenters the case.

March 1985. U.S. District Court of Appeals for the Fourth Circuit rules that

Judge Kaufman improperly placed on the plaintiffs the burden of proof for demonstrating discriminatory intent in African-American student over-representation in special education programs and under-representation in the TAG program. Upholds lower court decision in all other matters on which appeal was taken.

June 11 1985. On remand of the case from the Court of Appeals, Judge Kaufman finds that defendants have met the burden of proof with regard to both special education and TAG placement.

June 21 1985. Parties sign a Memorandum of Understanding (MOU), which in most respects governs the current situation. They agree to a proposed program of magnet schools designed to bring more Other Race students into schools with predominantly African-American populations. The Magnet School Program, in combination with continued busing for desegregation purposes is to bring most schools within a range of 10%-80% African-American enrollment, consistent with a maximum busing time of 35 minutes, until such time as the African-American student population should reach 65 percent.

Certain schools with very high percentages of African-American students, for which busing is not a practical solution to racial isolation ("Milliken II Schools"), are to be provided with specified additional resources and programs to compensate for their racial isolation. The goal is to have 85 percent of schools within the 10%-80% guideline. This guideline, applied separately to elementary, middle and high schools, is to remain in effect only until school system enrollment exceeds 65 percent African-American. No provision is made for what should happen once the system passed 65 percent African-American enrollment. MOU also includes the following agreements:

- PGCPS will continuously review the effects of the magnet programs to see if they are successful in achieving specified desegregative effects.

- Plaintiffs will not challenge the attendance areas for those schools outside the guidelines for African-American student population which are slated to receive extra resources.

- TAG magnet programs will have as a goal enrollments of 50 percent Black, 50 percent Other Race. The parties also agree that the resources brought to a school by the TAG magnet will be available to all other children in the school.

- PGCPS will perform a new study of busing and make recommendations to the plaintiffs and the Court about ways of eliminating unnecessary busing and reducing busing time and distance for African-American students.

- An agreed "back-up plan" based on this study will be implemented should the magnet programs fail to have their anticipated desegregative effects.

- PGCPS agrees to establish a citizen committee to advise the system on magnet and compensatory education programs and to monitor them.

April 1991. In response to a suit brought by teachers protesting PGCPS' denial of seniority rights in transfer requests, the Court rules that when assigning new teachers to schools, PGCPS should strive to bring the proportion of African-American teachers to within a range of +/-7 percentage points of the previous year's percentage of African-American teachers in the system. In cases of voluntary transfer of teachers between schools, negotiated seniority rights will apply unless the transfer would bring the teaching staff at either the sending or receiving school to more than 50 percent African-American or less than 12 percentage points below the percentage of African-American teachers in the system the preceding year.

April 1996. Plaintiffs return to Court in objection to a school system initiative to fill with African-American students unfilled spaces in magnet programs designated for White students. The Court permits the practice after due additional efforts to locate Other Race students willing to fill the places. Defendants ask that the long-standing desegregation court order be substantially narrowed in scope. The Prince George's County Government joins the school system, asking the Court to remove the order entirely and declare the school system unitary. Both parties and the Court ask this Court-appointed panel to examine the current status of desegregation in PGCPS in terms of the 14 factors listed above and in the context of the judicial history of the case.

V. Discussion of the Fourteen Factors

Following is a summary of the major findings for each of the fourteen factors the Panel was asked to consider.

A. Student Assignments

Analysis here focuses on the desegregation results both by school and by classroom. This analysis of enrollment trends is conducted against a background of changes in the racial composition of the student body, in desegregation standards, and in strategies designed to further desegregation.

1. Desegregation of Schools

The 1983 Court order specified that the 80 percent upper limit guideline for African-American student enrollment in a school would hold only until African-American enrollment reached 65 percent. With no guidance beyond that point, PGCPS developed its own guideline for raising the upper limit proportionately to the growth in African-American enrollment. If the upper limit was 80 percent when system enrollment of African-Americans was 65 percent, a ratio of 1.23:1, then as African-American enrollment grew beyond that point at each school level, the upper limit would be 1.23 times the current African-American enrollment.

Rapidly increasing African-American enrollment has made it difficult to stay within this guideline. The system came closest in 1985 with 76 percent of elementary students, 85 percent of middle and 87 percent of high school students at schools within the 10-80 percent range. For the current school year the comparable figures are 70.2 percent for elementary schools, 92.5 for middle schools and 80.5 percent for high schools within the expanded guidelines, which are different for each level.

Two desegregation indices reflect the changing demographics. The "Index of Interracial Exposure" reflects the number of Other Race students in the average African-American child's school. This index shows a huge improvement with integration in 1973, followed by steady erosion as the percentage of Other Race students--and thus the maximum possible interracial exposure--declines. The curves of the maximum and the actual exposure follow each other closely, with some increasing separation between the actual and the possible in the early 1980's and a slight narrowing trend since then. Since the narrowing is coincident with the beginning of the magnet school program, it is possible to infer a causal relationship. This inference is supported by a continuing close approximation of actual interracial exposure in magnet programs to the possible maximum, suggesting that the magnet schools have kept interracial exposure within the school district as a whole as close to the maximum as it is.

The "Index of Dissimilarity" tracks the evenness with which students of different races are distributed across the system. This index shows a slight decline in racial imbalance with the institution of the magnet school program but then continues what has otherwise been an unbroken gradual worsening since 1974. Most of the change, however, took place before 1985. The changes have in recent years been within a narrow range.

Milliken II Schools, a designation used in Prince George's County as throughout the country, are predominantly African-American, racially imbalanced schools that receive additional programs and resources to compensate for their racial isolation. The percentage of total PGCPS enrollment in Milliken II Schools has increased from 6 in 1985 to 13 in 1996.

PGCPS' extensive program of busing for purposes of desegregation, along with Magnet Schools Program designed to encourage voluntary transfer of students to schools where their racial group is underrepresented, had some immediate successes in improving racial balance to target levels but were unable to sustain the improvements. The major factor in this pattern has been the increasing percentage of African-American students in the system. Not only have the actual percentages increased but the rate of change has shown a steady upward progression. The consequent decline in the indicators of desegregation are visible for the system as a whole and for every sub-group within the system except the comprehensive schools.

2. Desegregation in Classrooms

The "Standardized Racial Exposure Index" reflects the degree to which the percent of Other Race students in each class deviates from their percentage representation in the individual school population as a whole. This index is similar to the "Index of Dissimilarity" used in representing the level of desegregation in the school system as a whole. With regard to this measure, PGCPS shows, in the panel's experience, a high level of classroom integration.

Prince George's County has virtually no classrooms with no African-American students. No such classrooms are to be found in elementary schools and only 0.3 percent in middle and high schools.

3. Desegregation in Special Programs

Lack of clarity in the 1985 Memorandum of Understanding about the long-term intent of the guidelines for TAG magnets and the MOU's silence on expectations for the

TAG program as a whole create difficulty in determining conformity to Court decrees. Today in the school system as a whole, students enrolled in TAG programs are 51 percent African-American and 49 percent Other Race. In the TAG magnets the average program is 57.8 percent African-American.

The school system's effort at inclusiveness in TAG programs may be understood by looking at the ways, called "paths," in which students get identified as "talented and gifted."

Path 1 is the traditional identification mode of test scores supported by teacher recommendation. Path 2 is used for students whose scores on the TAG Assessment Matrix are close to qualifying on the basis of test scores and have one or more of the following characteristics: English as a second language, low socioeconomic status, one or more years above grade level in reading and math, or a learning disability and high ability test scores. Students thus identified are included in TAG programs on a trial basis.

Path 3, also known as Project STEP, is directed specifically at "minority" students, minority identified not only in terms of race but those with language, cultural, economic or educational disadvantages. Teachers are trained in the use of criteria and observational data that will help them identify potentially talented and gifted students by means other than test scores.

Path 2, special identification on a trial basis, is the means of access for 64 percent of TAG students. Project Step, which is particularly directed at non-White students, adds another 11 percent. Thus the system appears to be trying hard to give all students who can benefit from TAG programs a chance to do so, working in many ways, with multiple criteria, and ultimate decisions by committees which are racially balanced.

Since grade records are not kept centrally for elementary school students, the Panel had only middle and high school grade distributions in TAG courses to estimate how African-American students are graded once they are admitted to the program. They get disproportionately low percentages of the A's, about proportionate numbers of B's and disproportionately high numbers of the lower grades.

Advanced Placement courses are offered to students in the eleventh and twelfth grades. In 1996 African-Americans represented 51 percent of the enrollment in these courses at a time when 74.1 percent of high school students are African-American. This situation represents a proportionate improvement over a five year period from 42 percent African-American enrollment in these courses in 1992 when the high school population was 68.9 percent African-American.

The International Baccalaureate Program (IB), a two-year program of demanding high school courses overseen by an international body, is offered in four high schools and enrolls 1425 students, 65.6 percent African-American. Thus African-American students are enrolled in the IB program in numbers more nearly proportionate to their representation in high schools than they are in TAG programs.

With regard to special education, PGCPS is now operating under a 1996 "Partnership Agreement" with the U.S. Office for Civil Rights. The system has agreed to explore the reasons for the overrepresentation of African-Americans in the mental retardation, seriously emotionally disturbed, and specific learning disabilities categories and to develop strategies alternative to special education placement for helping some of these students.

B. Faculty Hiring and Assignments

The applicable guidelines governing assignment of teachers by race have a complex history and are somewhat confusing. Readers unfamiliar with these guidelines are urged to consult the full text.

1. Teacher Hiring

PGCPS has done extremely well with the hiring of African-American teachers. At a time when the teaching staff has grown by 17.4 percent in the past five years (from 6168 to 7244), and when there is intense competition for comparatively small numbers of African-American teachers both nationally and within the Washington metropolitan area, PGCPS has increased the percentage of African-American teachers in the system from 31 percent in 1993 to 38 percent in the current school year. The result has been achieved by mounting an imaginative and aggressive recruitment campaign, which has generated a large pool of African-American applicants.

2. Teacher Assignment by Race

A benchmark range of +/-7 percentage points from the percentage of African-American teachers in the system applies to the assignment of new teachers. This range is unique to PGCPS.

The court-approved range going from a minimum of 12 percentage points below the African-American teacher percentage in the system to a maximum of 50 percent of the school's teaching staff applies to the transfer of teachers within the system. The system may override seniority rights and deny any transfer in cases where the transfers would have a negative effect on racial balance at schools outside the range or cause schools to fall outside of it. This range, currently 25-50%, is the more reasonable basis for measuring success, because it applies to the situation as it exists rather than to a guideline applicable only to new assignments. Slightly more than two thirds of the schools (70%) fall within this guideline. The percentage of schools within guidelines varies with grade level.

3. Teacher Assignments by Experience

The average amount of teacher experience in schools with higher percentages of African-American student enrollment is consistently less than that for schools with lower percentages. This pattern holds true for every level and for each of the past six years.

The difference in teaching staff experience at the elementary level between the highest and lowest percentage African-American schools has decreased some since 1992 from 5.32 years to 3.9 years. Still, the highest percentage African-American schools, mostly Milliken II Schools, have substantially less experienced teaching staffs than the schools that are more than half Other Race.

4. Teacher Assignments by Level of Education

A study done by the Department of Research, Evaluation and Accountability shows that the average years of education for teachers in a school is a statistically significant factor in their students' performance on MSPAP tests relative to expectations. Data on education levels for elementary grade teachers for the 1994-95 and 1995-96 school years shows that Other Race elementary school teachers average about the equivalent of one more university course (i.e., about 0.1 more years of post-baccalaureate training) than African-American teachers. While this difference is statistically significant, it does not seem like a large difference.

In terms of teacher training by school, there is a somewhat larger difference between schools with higher and lower percentages of African-American students.

amounting to the equivalent of 2-3 university courses.

5. Teacher Assignments to Advanced Placement (AP) Courses

The 20 high schools in Prince George's County offer a total of 157 sections of Advanced Placement courses. Of these, 24 sections or 15 percent of the total are offered by African-Americans, a substantial under-representation considering that 45.3 percent of the average high school's teaching staff is African-American.

C. Staff Hiring

Over the past five years, the percentage of African-Americans has increased in every job category. Furthermore, with three single year exceptions, the percentage of African-Americans in each job category has increased or remained constant every year.

D. Transportation

Busing students to achieve racial balance has been a core element of the remedy to segregation since the 1973 implementation of the 1972 decision in Vaughns. The Magnet Schools Program was intended as an alternative to further involuntary reassignment.

In 1973, the burden of desegregation busing fell equally, as far as numbers were concerned, on African-American and Other Race students. Over the years, however, the percentage of African-American students enrolled in the school system increased, those students in 1996 accounting for 91.8 percent of those bused to achieve desegregation in a system 73 percent African-American. Such disproportionate busing burden on African-American students occurs when school districts try to meet racial balance requirements in a situation of declining White enrollment such as exists in Prince George's County.

Having been found culpable for changing the busing plan in 1980, PGCPS has made only minor changes within the guidelines to adjust for school openings and closings and has not gone back to the Court to get approval for an overhaul of the plan. The current busing plan, not including magnet busing, makes about a three percentage point contribution to desegregation.

The percentage of African-Americans bused to magnet schools is currently about 72 percent. This percentage is almost exactly proportionate to the student racial distribution.

E. Extracurricular Activities

Cross-race contact outside the classroom is measured using the same kind of indexing employed in analyzing racial contact in schools and in individual classrooms. School-wide calculations for each of the secondary schools show that schools with the largest percentages of Other Race students have the highest percentage other in extracurricular activity participation. Within most schools, however, the pattern of desegregation varies widely from one type of activity to another. This kind of analysis is more useful in looking at activities within a school than at the school as a whole.

F. Facilities

This factor has been interpreted broadly by the courts to include not only school buildings, but also other resources that support education. Thus, in addition to looking at physical facilities under this heading, individual school funding is also considered.

1. Physical Facilities

The possible issue here is the relative quality of school buildings and facilities within them that are available to students in schools with different racial/ethnic balance.

Analysis of capital spending in terms of location reveals no pattern that suggests differential treatment. Most of the few new schools have been built outside the Beltway and in the northern part of the county where the growth in population has occurred. Spending on renovations and systems has been about equally divided between north and south. Most of the renovations have been inside the Beltway where most older schools are located.

The system's schools, with rare exceptions, have State ratings of fair to good. The existence and condition of certain kinds of facilities within buildings does not seem to be related directly to racial/ethnic patterns but rather to the age of the buildings.

Although the schools are older inside the Beltway and south of Central Avenue, they are not less well maintained. Schools in all geographically defined sectors are within .3 of a point of the average State-rated condition for the system as a whole.

The panel observed two instances in which paired schools north and south of Central Avenue had facilities in strikingly different condition: Eleanor Roosevelt High School and Oxon Hill High School; Tall Oaks and Croom vocational schools.

2. **Instructional Expenditures**

Total expenditures per student, including state and federal as well as locally generated funds, are on average fairly equitably distributed between schools with African-American enrollment below the system average and those above. Magnet schools with a higher Other Race student body receive an average $44 or .1 percent less per pupil than those with higher African-American populations. Among comprehensive schools, the differential is somewhat larger, $389 per pupil or 10.5 percent. Funding for the model comprehensives is identical to that for the higher percentage African-American schools. Milliken schools, as expected, get the highest per pupil funding.

Looking only at funds from county sources, per pupil expenditures are greater at schools with higher African-American enrollment, except for magnet schools where the opposite is true. Model comprehensives and other comprehensives with greater African-American enrollment receive much the highest per pupil support from county funds, much more than Milliken schools whose differential funding comes from state and federal sources.

G. Quality of Education Being Offered to Black and White Student Populations

Issues related to magnet and Milliken II schools are considered under this heading.

1. The Magnet School Program

Beginning in 1985, PGCPS established and maintained an unusually large and diverse set of magnet programs which have had a significant, consistently positive effect on desegregation. Since 1987-88, the first year of large scale magnet

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operations, enrollment has grown from 11,745 to 27,403. 23 percent of all African-American students are enrolled in magnet programs and 20.3 percent of all Other Race students. In the current year African-American students constitute 75.7 percent of the magnet program enrollments and 73.3 percent of the total school enrollment.

The great majority of the magnets, 75 percent, have been placed in schools that in 1984, the year before the Magnet School Program was initiated, had more than 50 percent African-American student enrollment. This choice is appropriate, since the intention is to draw other race students to schools with a high percentage of African-American students. Thus about 60 percent of the programs are south of Central Avenue and 58 percent are inside the Beltway. Eighty-seven percent are located in either one or both sectors.

All magnet programs, to at least a small degree, positively affect racial balance.

- Magnet programs reduced the percentage of African-American enrollment in schools with an attendance zone greater than 70 percent African-American and increased African-American enrollment in schools less than 70 percent African-American.

- The "program-within-a-school" structure (e.g., TAG magnets) has greater desegregative effect than the "whole school attendance zone structure" (e.g., Traditional/Classical Academy) for schools whose enrollment without the magnet is greater than 70 percent African-American. The whole school attendance zone structure has the greater impact in schools whose attendance area enrollment is less than 70 percent African-American students.

- Having a "mirror" magnet in a school with less than 50 percent African-American enrollment positively affects the attendance of Other Race students in the magnet it "mirrors." The mirror magnets have been quite conscientious about restricting enrollment from outside their attendance areas to African-American students.

The Panel noted several issues affecting the Magnet Schools Program that should be considered.

a. Program Purpose. Magnets were created as an instrument of desegregation by offering parents and students choice of educational opportunities. However, the choice aspect has become dominant in the eyes of parents and the public, even as the school system tries hard to maintain the primacy of the desegregation purpose.

b. Variety of Magnet Programs. The current mix of magnet programs has not been reviewed for quite some years to see if the existing array of programs best meets student needs, if some models need revamping, and if some additional models might be developed.

c. Evaluation. PGCPS has begun a comprehensive formative evaluation of each major type of magnet program, asking various stakeholders (teachers, parents, staff, students) how well they perceive the different kinds of magnet programs to be employing the educational strategies and supporting the program structures that define their special nature. However, clear educational goals for most types of programs have not been established and no systematically gathered information is available about how students progress and perform as a result of their participation in PGCPS magnet programs.

d. Accountability. Accountability for the success of the Magnet Schools Program is divided between two parts of the school system administration. The Magnet Program Coordinator is responsible for administering the mechanics of the countywide program and ascertaining that the schools are implementing their magnet programs as they were designed and intended. Day-to-day management and supervision of the programs lies with magnet program coordinators who are accountable to their school principals who are in turn accountable to the Chief Educational Administrators (CEAs) of each of the 20 school clusters. The CEAs are responsible to the Deputy Superintendents. This structure seems problematic in that those administrators who are focused on magnet programs and have expertise in their curricula and management (i.e., the Magnet Program Director and the magnet coordinators) do not have authority to direct their functioning, while those who have the authority (i.e., the principals and CEAs) are accountable for magnet program functioning only as one concern among many.

2. Milliken II Schools

Eighteen elementary schools, three middle schools (or some grades within the school) and two high schools have been designated as Milliken II Schools because of their high percentage of African-American students (over 90 percent) and receive enriched programming and funding. These additional resources have been committed as promised.

Disparities between the 18 Milliken elementary schools and the 18 elementary schools with the lowest African-American student enrollment are noted in two areas:

- Teachers in Milliken schools average 30 credits beyond the baccalaureate degree. Teachers in the comparison schools average about 15 percent more training.
- For the current school year, the 18 Milliken Schools average 9.17 years of experience per teacher. The 18 elementary schools with the lowest percentage of African-American students average 12.5 years, a difference of 3.33 years or 36 percent more experience.

Two problems make it difficult to address the effectiveness of the Milliken Schools:

a. Lack of Clarity About Expected Outcomes. PGCPS has not made clear what outcomes are expected to result from the provision of additional resources beyond stating that Milliken Schools are held to the same standards, largely measured by standardized test scores and other MSPP goals, as other schools.

b. Program Evaluation. PGCPS has done a recent formative evaluation for Milliken Schools similar to that done for some magnet programs. The only summative evaluation shows that in absolute terms Milliken elementary schools do less well on MSPAP reading and mathematics tests. However, when these results are controlled for socioeconomic status of students and student mobility, these schools show a pattern similar to all elementary schools.

H. School Board Appointments to Committees

Data here are incomplete and scattered. The panel has insufficient information on which to base an analysis.

I. Compensation

Teacher salaries are determined by a standardized salary schedule that applies equally to all. PGCPS has no provision for merit pay, so no differential treatment is possible.

The only compensation area in which differential treatment might occur is in selecting teachers for assignments that carry extra stipends (coaching, leading musical organizations, etc.) or summer pay. Data for the last three years indicate that African-Americans and Other Race faculty get equal shares of summer compensation. Since African-Americans constituted 36-38 percent of the teaching force in those years, it appears that they are over-represented among those receiving summer compensation. The same distribution holds in both athletic coaching assignments and stipended leadership of school vocal and instrumental music groups.

J. Curriculum

No differences among elementary schools are found in matters of curriculum, since all schools follow the same programs. Even in middle schools only slight differences exist, since students have only limited choice.

Among high schools, the only separable curricular element is the more advanced courses, particularly Advanced Placement and TAG offerings and the International Baccalaureate Program. No notable difference is to be found in terms of availability of AP and TAG courses at those schools with African-American student enrollment above and below the county average. Those above this level average 14 such courses, those below 13. For Advanced Placement courses alone, the averages are 8 and 7.5 respectively.

K. School Location

To the degree that the panel has been able to identify issues relevant to this factor, they are addressed in the "School Facilities" section.

L. Comparative Dropout Rates

"Dropouts" are those students who leave school in any given year for any reason other than transfer out of PGCPS. The system classifies dropouts into three categories: "voluntary," "whereabouts unknown," and "expelled or otherwise excluded." The African-American student dropout rate for all reasons approximates or is lower than that of Other Race students over the last five years and for each year. They are underrepresented in the voluntary dropout category, which accounts for 54 percent of the total. They are slightly over-represented in the "whereabouts unknown" category

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(33 percent of the system dropouts) and greatly overr-represented among students expelled from the system. In the school year ended June, 1996, African-Americans accounted for 91 percent of the expulsions but only 72 percent of the high school enrollment.

In 1983, 64 percent of the suspensions were meted out to African-American students at a time when they represented 49 percent of the student enrollment. That disproportionality continues, although it is not so great. Over the past five school years, African-American students have received 83-86 percent of the suspensions in each year as their percentage of system enrollment has increased from 66 percent to 72 percent. Expulsions follow the same pattern, with African-American students accounting for 84-90 percent of the expulsions in any year of the past five. The disproportionality of African-Americans is particularly high in those categories which depend heavily on judgment in determining offensive behavior.

M. Graduation Rates

Most students earning a diploma from a Maryland high school receive either a Maryland Diploma or a Maryland Diploma with a Certificate of Merit. The Certificate of Merit signifies the student's successful completion of a State-specified academic program more rigorous and extensive than is required to earn the diploma alone.

In the spring of 1996, 63 percent of all students graduating from PGCPS received the Maryland Diploma, 36 percent the Diploma with Certificate of Merit. Over the past five years, graduation rates for all racial/ethnic groups have been proportionate to their numbers in the student population. However, African-American students completed the more demanding program at a rate lower than their percentage representation in the population: in spring, 1996, for example, African-Americans were 72 percent of the graduating class but 63 percent of the Certificate of Merit awardees. The rate at which African-Americans earn the Certificate of Merit has, however, been increasing over the past five years faster than their percentage in the graduating class.

N. Scores on Standardized Tests

Prince George's County students regularly take four sets of standardized tests: the California Test of Basic Skills (CTBS), the Maryland Functional Tests (MFT), the Maryland School Performance Assessment Program tests (MSPAP) and the Scholastic Achievement Test (SAT). African-American student scores on all these tests are consistently lower than for Other Race students. African-American students in comprehensive schools perform at the same levels as those in magnet schools.

Multiple regression analyses show that race, independent of the other seven variables in the equation, usually has the strongest negative association with test scores for all standardized tests at all grade levels. Socioeconomic status, as represented by eligibility for free and reduced price meals, usually has the second largest negative effect. In several equations, however, it had the greatest effect. Being in a magnet school or a school whose teachers perceive it to have a favorable climate are usually major positive contributors to test outcomes. These correlations all have a high degree of statistical significance as expected with a large sample.

Being in a Milliken school always has a negative effect, but this correlation rises to the level of statistical significance only for the MFT.

VI. Conclusions

A. The Four Questions Considered

1. Has there been full and satisfactory compliance with the Court's decrees?

Over the 25 years that the Vaughns case has been before it, the Court has issued decrees in the following areas:

a. Student assignment to schools
b. Faculty hiring
c. Faculty assignment to schools by race
d. Staff hiring
e. Student transportation
f. Magnet programs
g. Milliken II Schools

h. Talented and Gifted Programs

The plaintiffs also brought before the Court in 1983 the matters of student assignment to classrooms, student suspension and special education, but no court decree requiring school system action has been issued.

a. Student Assignment to Schools

PGCPS has made substantial efforts to reach the goals set by the Court, but has not fully done so. The Panel believes, though, that the system has achieved compliance to the extent practicable, given increasing African-American enrollment, the geographic distribution of students, and budgetary limitations. The Panel further notes that these guidelines were intended to be flexible and flexibly administered.

b. Faculty Hiring

PGCPS has mounted a concerted and imaginative program to recruit African-American teachers. The program has resulted in a steady growth in the percentage of African-American teachers in the teaching force, even at a time when the absolute number of teachers has been increasing. In the matter of teacher hiring, we find PGCPS fully in compliance with Court decrees.

c. Teacher Assignment to Schools by Race

The Panel asked many principals about their conformity to system teacher staffing guidelines. Most were unclear about what those guidelines actually are, but all were certain they are within guidelines. In fact, for the current school year, a third of the schools are outside the 50% to -12 percentage point range.

When first imposed, the intention of the teacher assignment guideline was to eliminate racially identifiable faculties, which the school system has done. The other purpose is to distribute African-American teachers fairly evenly throughout the system. In view of the fact that so many principals seemed unaware of what the goals are and how they applied to their schools, we are left with some question as to how vigorously and proactively PGCPS has pursued this purpose.

d. Staff Hiring

PGCPS has had continuous success in pursuing hiring practices that move the system toward a staff that "generally reflects the population of Prince George's County." Even if that goal has not been fully reached in all job categories, the system has kept its "longstanding commitment," reiterated in the MOU, "to hire and promote qualified blacks throughout all employment levels of the public school system." We find PGCPS substantially in compliance with Court decrees.

e. Student Transportation

The transportation plan has been in effect since 1973. The reopening of the Vaughns case stemmed from a school system move in 1980 to alter that plan without court approval. Judge Kaufman's 1983 ruling required that PGCPS return to the 1973 plan, which they have done. The Court directives also require limiting transportation time for desegregation--as opposed to magnet--purposes to 35 minutes. Current desegregation busing has only a small positive effect on racial balance, and in the case of middle schools a sometimes negative effect.

The system has also maintained a major program for busing students to magnet schools. This effort has clearly had a positive effect on desegregation without creating inequalities of busing "burden" between African-American and Other Race students. The 1985 MOU required that PGCPS submit annually a "back-up" plan for involuntary busing if the Magnet Schools Program were unsuccessful. When it became evident early in their existence that the magnets were going to have their desired effect, the school system sensibly ceased work on this plan.

f. Magnet Programs

The 1985 MOU is predicated upon establishment of an extensive system of magnet programs as an alternative to involuntary busing. The Magnet School Program has clearly had its desired effect on desegregation. The racial balance of magnet programs as a whole very closely tracks the racial balance of the system as a whole. Virtually all magnet programs make at least some positive contribution to desegregation. The school system has clearly met its Court-ordered obligations with respect to the establishment and maintenance of a system of magnet programs for purposes of desegregation.

g. Milliken Schools

For schools whose racial isolation admitted of no practicable mitigation, the parties in Vaughns agreed in the 1985 MOU that PGCPS would provide extra resources in lieu of strategies to achieve racial balance. The promised resources have been provided, even in those years in which the school system budget has been under extreme pressure. PGCPS has fully met its obligations.

h. Talented and Gifted Magnets

The 1985 MOU addresses only TAG magnets, not the TAG program broadly. The parties agreed that in school year 1986-87 and thereafter African-American and Other Race enrollment would be equal, though the language does not make clear whether that equality should be in each magnet or TAG magnets as a whole. They also agreed that the resources of the TAG programs would be made available to the entire population of the school in which the program is housed.

No individual TAG magnet has an enrollment half African-American and half Other Race. Enrollment in the TAG magnets as a whole is 57.2 percent African-American, 42.3 percent Other Race. If the intention of the agreement was to work toward fuller representation of African-Americans in TAG magnets, the goal has been more than met. If the goal was to keep African-American enrollments proportionate in all schools, as their percentages in the school system grew, to the 50 percent contemplated in 1986-87, the goal, which in 1996-97 would be 61 percent, has almost been met.

No school has become exclusively a TAG magnet school and TAG resources have been shared in various ways with other children in the schools.

We conclude that PGCPS has substantially met the requirements of Court decrees with regard to TAG magnet programs.

In summary, we have concluded that in six of these eight areas in which the Court has issued decrees, PGCPS has fully or substantially complied. In the area of student assignments to schools, we believe the system has complied to the extent practicable. Only in the area of faculty assignment to schools do we believe that a more proactive effort might be made, although we are by no means sure that, given a variety of circumstances over which the system has no control, much improvement in the actual results could be achieved.

2. Is retention of judicial control necessary or practicable to achieve compliance in any respect?

In only two of the factors considered above do we find any reason to believe that the system is not in full or substantial compliance with Court decrees. In the matter of student assignment we believe that PGCPS is in compliance to the extent practicable. With regard to teacher assignment to schools, we cannot determine how much impact Court insistence on a more proactive effort, absent a change in seniority override provisions, could hasten movement toward the goals.

3. Has the School Board demonstrated a good faith commitment to the whole of the Court's decrees since they were entered?

Judge Kaufman's 1983 decision indicated that he did not think the School Board had done all that it could to eliminate racial imbalance in the schools. Since that time, however, the Board appears generally to have done so. Certainly large amounts of money have been invested in busing, in magnet and Milliken programs and in faculty hiring. Substantial results have been achieved in hiring and in the establishment of magnet programs. Reporting requirements, except for the unnecessary back-up busing plan, have been faithfully met.

The Panel raises questions in the related matter of system record keeping, but the members do not mean to say that the absence of a more consistent, systematic, outcomes-oriented data collection, research and evaluation program constitutes bad faith.

4. Have vestiges of past discrimination been eliminated to the extent possible?

Here the panel discusses those factors not included in prior Court decrees.

Two factors, "School Board Appointments" and "School Location," have not raised any issues seen relevant to past discrimination.

Analysis of four other factors reveals no discernible patterns that would raise questions about vestiges of prior segregation. These factors include extracurricular activities, the physical condition of facilities, graduation rates, and summer and stipended employment opportunities.

Another group of factors, largely related to student performance or treatment of students, shows clear patterns of disproportionality. These factors include the under-representation of African-Americans in TAG programs and Advanced Placement

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courses, their overrepresentation in some special education programs and among those suspended and expelled, and a persistent gap between African-Americans and Other Race students on standardized tests. The panel found no evidence in policy or procedure to link these factors specifically to vestiges of prior segregation. The clear and pervasive statistical association, independent of other variables, of lower standardized test scores with being African-American requires consideration.

A further group of factors involving assignment of teachers seems to the Panel to show a pattern of differential treatment between schools with higher and lower African-American student enrollment.

- Assignment of teachers by years of experience.
  Average teacher years of experience in schools with African-American student enrollment above the county average has for at least six years been substantially lower than that for schools with African-American student enrollment below the average for the system. Similarly, average teacher experience for the 18 Milliken II elementary schools in the current year is 3.33 years less than the 18 elementary schools with the lowest African-American student population. Schools with higher percentages of African-American students have a larger percentage of new teachers and a smaller percentage of highly experienced teachers than schools with lower African-American enrollments. The pattern is persistent and the differences in average years of experience are substantial.

- Assignment of Teachers by Years of Education. The same pattern holds true for years of teacher education, but here the absolute differences are not very great, even if they are sometimes statistically significant. The Panel makes a point of this pattern because school system studies show a strong positive correlation between teacher years of experience and student performance relative to predicted outcomes on MSPAP tests.

- Assignment of Teachers to Advanced Placement Courses. The percentage of African-American instructors among those teaching Advanced Placement courses (15%) is strikingly low proportionally.

B. Further Considerations

Certain complexes of related phenomena do not appear to be the result of any intentional discrimination or to constitute a pervasive pattern of discrimination but could in concert produce persistent disparities that raise concern. Examples include:

- Disproportionately low representation of African-American students in more demanding high school programs.
- Certain high schools where differential representation of African-American students and teachers is consistently observable in a variety of circumstances.
- Two particular comparisons of schools with parallel programs where the school with the higher percentage African-American enrollment has the much inferior facility.

The Panel also expresses concerns about the effectiveness of structures of accountability for dealing with a range of desegregation-related issues.

C. A Final Recommendation

If the Prince George's County Public Schools are declared a unitary district, the system should first be required to submit a plan of action for their new status. Among such other matters as the Court and the system consider important, this document should:

- declare intentions for keeping special resources in place,
- set forth post-unitary policies consistent with these intentions,
- lay out plans for identifying the funds to continue support of programs that have been effective in achieving desegregation,
- define areas of accountability,
- provide the design for a systematic research and evaluation program to assure that the district continues in desegregated status.

MARYLAND STATE
DEPARTMENT OF EDUCATION

PRESENTATION TO:
SUBCOMMITTEE ON FUNDING EQUITY
SUBCOMMITTEE ON ACCOUNTABILITY

ON

PRINCE GEORGE'S COUNTY
PUBLIC SCHOOLS

NOVEMBER 5, 1997

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EXECUTIVE SUMMARY

The Maryland State Department of Education has been asked to address concerns regarding the quality of educational services received by students in Prince George's County Public Schools.

Prince George's County Public Schools consistently have ranked near the bottom of Maryland's public school systems since the inception of the Maryland School Performance Assessment Program (MSPAP). Almost 70% of Prince George's County Public Schools rank in the bottom quartile of the School Performance Index (SPI). Last year, Prince George's County ranked 23rd in the State for its MSPAP scores, with only 29.6% of students scoring at a satisfactory level. Nearly 13% of the system's teachers held only provisional certification in the 1996-97 school year (compared to a statewide average of 4.7%). Furthermore, the system lacks evaluation and accountability measures for school improvement programs.

This document lays out potential remedies for the school system, using strategies that have proven themselves effective in successful schools.

Part I: Background evaluates Prince George's Six Year Plan and provides a summary of the findings of the *Vaughns* Expert Panel. The Maryland State Department of Education finds that the Six Year Plan proposals fails because it does not provide effective measures to ensure that its approaches, with their substantial funding outlays, will produce significant improvements in student achievement. The court-appointed Expert Panel which reviewed the status of desegregation in Prince George's County Public Schools found pervasive problems in evaluation and accountability.

Part II: Managing for Successful Change, provides Maryland State Department of Education recommendations in the areas of school performance, the teaching force, and financial and management accountability:

SCHOOL PERFORMANCE ACCOUNTABILITY

1. Conduct school-specific and systematic comprehensive needs assessments.
2. Select research-proven intervention strategies.
3. Develop school improvement plans.
4. Create a management system to support the implementation of the improvement plan.
5. Provide accountability for systemic reform.

PROFESSIONAL DEVELOPMENT, TEACHER CERTIFICATION, AND MENTORING

1. Amend COMAR regulations pertaining to provisional certificates in order to reduce the number of provisional educators by limiting the time a person can hold a provisional certificate. Larger numbers of provisional educators can seriously undermine local and state efforts to meet student achievement standards.
2. Establish and provide funding for a comprehensive program to assist provisionally certified teachers in Prince George's County in becoming fully certified.
3. Replicate Baltimore County Public School's Teacher Mentor Program in Prince George's County Public Schools.

FINANCIAL AND MANAGEMENT ACCOUNTABILITY

1. Undertake a comprehensive financial audit by an independent certified public accounting firm to review internal control structure and the proper classification of expenditures.
2. Provide additional funds to address issues of at-risk youth, limited English proficient students, and professional development under the Targeted Improvement Program (TIP).
3. Redirect categorical school funds currently received by Prince George's County to enhance effective school programs.
4. Provide funding for a pilot integrated student support services program to support the expansion of support services to at-risk children who live in neighborhoods of poverty.

Part III: Guidelines for Developing a School Improvement Plan, provides detailed information on how to build an action plan that is school-specific and which builds on previous school improvement strategies.

PART I:

BACKGROUND

REVIEW OF PRINCE GEORGE'S COUNTY'S COMMUNITY SCHOOLS PROGRAM

(SIX YEAR PLAN)

INTRODUCTION

The Prince George's County Public School System recently completed its plan to eliminate segregation in its schools. In the introduction, the plan proposes four major goals. They are:

- ☐ Return the 11,400 involuntarily bused students to schools in their own communities and address the construction and operational needs required by the projected rapid growth in student population.
- ☐ Develop an educational program that would meet the needs of those students returned to their community schools.
- ☐ Retain the current Magnet and Milliken desegregation programs.
- ☐ Develop a rigorous accountability program.

The Maryland State Department of Education has reviewed and evaluated the plan in terms of its proposals for increasing student achievement, improving the skills of the teacher workforce, and establishing accountability measures to test the program's effectiveness.

EDUCATION PROGRAM/STUDENT ACHIEVEMENT ($10.1 MILLION)

Prince George's County proposes to retain its magnet schools and establish 29 additional Milliken II schools and 62 model comprehensive elementary schools. However, there are no data to show that the Milliken II schools lead to increased school achievement. The achievement data on the model comprehensive schools does not overwhelmingly support their expansion. The Department's 1996 data show that for elementary schools, the Comprehensive, Magnet, and Model Comprehensive schools only marginally exceeded the performance of the county average, while the Milliken schools fell well below the average.

The Prince George's County School System's educational plan is a list of programs rather than a detailed plan of operation showing how each of these plans will be employed to focus on student achievement. Furthermore, no specific criteria or evaluation has been put forth to measure the effectiveness of these programs in improving student performance. The proposal for "technology academies" also lacks an implementation plan, effectiveness measures, and an evaluation plan. The "After School Component", which could be significant, lacks detail on objectives, results, plan of operation, and linkages with existing school and community efforts.

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TEACHER TRAINING AND MASTER TEACHERS ($1.6 MILLION)

The Plan proposes the creation of 60 Master Teachers who would be detailed to new and poorly performing schools. For serving as Master Teachers, each would receive an additional stipend for three years and then revert to their original salary. The Master Teachers would serve as peer coaches for classroom teachers. Again, this program proposal does not contain any plan of operation to ensure implementation nor does it put forth evaluation criteria to assess its effectiveness. Furthermore, the long term implications are not clear, if the program is only to run for three years. The other approaches (Comer Training, Multi-Cultural Education Training, and New Teacher Staff Development) are listed, but no implementation or evaluation plan is given. The "bold new staff development initiative" does not provide details about what kinds of training are needed or will be provided, or how the system will demonstrate an integration of these trainings into delivery of instruction that has measurable impact on student performance. The plan also does not address the issue of the large number of provisional certificate holders. There are other additional approaches which should be considered including ongoing staff development and replication of proven mentoring strategies.

ACCOUNTABILITY

While it is clear that the Plan recognizes the need for accountability measures, it does not show the linkage between the proposed program and the expected results. Rather, it provides another listing of existing MSPAP and functional test indicators, but sets no performance targets which could show that the new programs are working.

SUMMARY

This proposal fails in that it does not identify specific needs as determined by a comprehensive needs assessment, present a detailed a plan of implementation and operation, nor propose any criteria to assess the effectiveness of the approach. Rather it is a broad-based listing of approaches which lack focus on "best practices" to increase student achievement. It also fails to provide a comprehensive approach for the improvement of teacher training, nor does it link its proposals for teacher mentoring to proven results. Overall, it lacks effectiveness measures to ensure that the approaches combined with the substantial fund outlays will produce significant required improvements in student achievement.

FINDINGS AND OBSERVATIONS OF THE *VAUGHNS* EXPERT PANEL

In December, 1996, the federal district court appointed an expert panel to review and report on the status of desegregation in Prince George's County Public Schools. The panel was specifically asked to answer four questions regarding the extent to which Prince George's County Public Schools had complied with school desegregation court orders, and the results of the school system's efforts. Not surprisingly, the panel's analysis and findings were directed at answering the court's inquiries, and they reflect the panel's primary interest in desegregation issues accordingly. However, in the course of analyzing Prince George's County Public Schools' compliance with the desegregation court orders, the panel made some important findings and expressed insightful observations as to broader educational issues facing Prince George's County Public Schools.

The following summarizes many of those findings and observations, particularly as they relate to concerns central to the current discussion of possible statewide and Prince George's County Public Schools-based initiatives to improve educational programs in the school system. In each category, the panel's central desegregation findings are summarized, followed by the panel's findings and comments in the wider context of educational quality and achievement.

MAINTENANCE AND EXPANSION OF MILLIKEN II SCHOOLS

Desegregation Findings: Prince George's County Public Schools has devoted promised resources to the current Milliken II schools. However, by their nature, Milliken II schools do not enhance desegregation.

Other Findings: The panel made specific findings regarding the quality of education in Milliken II schools, since the very purpose of the infusion of extra resources in these schools is "compensation for their racial isolation." Thus, "if they have failed to mount an effective educational program they have failed as a remedy for segregation." (Panel Report, page 52.)

Ultimately, the panel concluded that it could not determine the effectiveness of the use of those resources, because Prince George's County Public Schools has never made clear what its expectations are for Milliken II schools, or what outcomes are appropriate as yardsticks for evaluation. No systematic evaluation of the programs has ever taken place. Prince George's County Public Schools is in the process of beginning a "comprehensive formative evaluation" of its programs, which will involve surveying stakeholders as to their views on the effectiveness of the programs. However, this process appears insufficient to establish "clear outcome expectations" for the Milliken II schools. (Panel Report, page 74.) As the panel concluded, "We cannot find anyone who can tell us clearly what results are expected as a consequence of providing these resources. (Panel Report, page 70.)

The panel was able to make the following observations about the effectiveness of the Milliken II initiative:

- The commitment to pursuing those strategies which have been agreed upon as mandated uses of Milliken II extra resources is uneven from school to school. For example, the panel noted that the Comer Program, a central Milliken II feature, has only been implemented partially. The panel found it "somewhat disconcerting to note that after ten years some schools seem not be far beyond the beginning of Comer Program implementation." Implementation failures have occurred even though the central office staff employed to assist in Comer implementation was increased from 2 to 6 two years ago. (Panel Report, pages 69-70.)
- County studies show that Milliken II schools do less well than other elementary schools on MSPAP. This conclusion does not take socioeconomic status or mobility into account.
- Teachers at Milliken II schools have 15% less post-B.A. training than teachers at other schools. They also have 36% less experience (in teaching years) than schools with the lowest percentage of African-American students.
- Milliken II schools receive the highest per pupil funding in the county. However, they receive less county funding than average, because much of their funding comes from State and federal sources.

MAINTENANCE OF MAGNET PROGRAMS

Desegregation Findings: Since 1985, magnet programs have had a "significant, consistently positive effect on desegregation." All magnet programs have some desegregative effect, with "programs within a school", e.g., TAG magnets, having the most substantial effect. In general, the panel has high praise for the magnets as a desegregation tool.

Other Findings: Magnet programs are extremely popular, and the ability to choose a child's program and school is highly valued by parents in Prince George's County Public Schools.

However, no systematic evaluation of the programs has ever been made by the school system. The existing array of magnet programs has not been reviewed in many years to determine how well it meets student needs, whether some programs should be restructured, and whether other models should be developed. While Prince George's County Public Schools' incipient "comprehensive formative evaluation" includes magnets, is directly solely toward improving existing programs, and will not consider whether the current group of magnets provides the most effective use of magnet resources. (Panel Report, page 59.)

Moreover, Prince George's County Public Schools has not established "clear educational goals" and has "no systematically gathered information . . . about how students progress and perform as a result of their participation in the Prince George's County Public Schools magnet programs." In fact, "Prince George's County Public Schools does not appear to have developed a statement about indicators of program quality on which an evaluation could be built." (Panel Report, page 61.) Thus, it was impossible to determine what effect, if any, the magnets had on student performance or other indicia of educational quality.

Accountability for magnets is disjointed. Magnet administrators who have expertise in the substantive aspects of the programs have no authority to direct their operations, and principals and central office administrators with such authority are uneven in their commitment to and focus on the programs. Accordingly, " cases arise in which no one person, either system wide or in an individual school, combines the expertise, the focus and the authority to make needed changes in the school's magnet program." (Panel Report, page 64.)

EXPANSION OF MODEL COMPREHENSIVE ELEMENTARY SCHOOLS

Desegregation Findings: Although mandatory (i.e., non-magnet) busing of students was unsuccessful in meeting the racial student enrollment guidelines in the desegregation decrees, the lack of success was the result of demographic change in the county. Thus, Prince George's County Public Schools has complied with those court-ordered goals, to the extent practicable.

The panel found no significant racially-linked disparities or inequities with respect to participation in extra-curricular activities, curriculum, dropout rates, participation in special programs and graduation rates.

Other Findings: Flaws in evaluation described above apply system-wide, including comprehensive and model comprehensive schools.

STAFF DEVELOPMENT INITIATIVES

Desegregation Findings: Prince George's County Public Schools is in full compliance with requirements regarding teacher and other staff hiring. However, the panel questioned the school system's efforts to meet guidelines for teacher assignments to individual schools.

Other Findings: Teachers in schools with the highest percentages of African-American enrollment have the lowest levels teaching experience and education. The panel noted that, according to Prince George's County Public Schools'' own research, such disparities in teacher education and experience are correlated with student MSPAP performance. These disparities were of particular concern in the Milliken II schools: "the level of teacher training and experience . . .are different from those related to supplies, equipment and special programs in that they are known to have a correlation with student performance independent of what would be predicted from SES and mobility." (Panel Report, page 72.)

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EVALUATION AND ACCOUNTABILITY SYSTEMS

Desegregation Findings: While the panel repeatedly expressed serious concerns in these areas, it concluded that the inability of the school system to provide necessary data, perform adequate evaluations, and ensure accountability, was not evidence of a lack of good faith in compliance with the desegregation orders. The panel noted that desegregation orders, including the Vaughns orders, are generally focused on inputs. Thus, it was unfair to judge Prince George's County Public Schools'' desegregation compliance with those orders on any evaluation of their results.

Other Findings: The panel found pervasive problems in evaluation and accountability. As a preliminary matter, Prince George's County Public Schools'' data collection was deemed inadequate to allow for meaningful evaluation. In many instances, Prince George's County Public Schools had never collected the requisite raw information needed to assess its educational programs in general or the even the discrete desegregative effectiveness of specific aspects of its programs, such as transportation times or assignment of teachers to advanced placement courses.

In addition, as discussed above in detail, Prince George's County Public Schools has persistently failed to define any outcomes upon which its various programs may be assessed, or to evaluate those programs to determine if they have met established goals. It is also unclear who, within the school system, is responsible for defining outcomes and following through on the appropriate evaluation and improvement process.

RECOMMENDATIONS:

Without elaborating, the panel made five recommendations for incorporation into a plan of action, should Prince George's County Public Schools be declared unitary and court supervision terminated. These would require Prince George's County Public Schools to do the following:

☐ Keep special resources in place.

☐ Establish policies consistent with this intention.

☐ Identify funding to provide continued support of programs effective in achieving "high quality desegregated education."

☐ Ensure accountability.

☐ Design a systematic research and evaluation program to assure a continuation of unitary status.

PART II:

MANAGING FOR SUCCESSFUL CHANGE

Of the 24 school systems in Maryland, Prince George's County is the second lowest performing school system, ranking 22nd on school performance measures. As Maryland State Department of Education data shows, the system-wide initiatives — Magnet, Milliken, and Model Comprehensive schools — have not been effective in improving student achievement. Furthermore, a large number of teachers in the school system hold provisional certificates. In a subsequent analysis of the relationship between the number of provisionally certified teachers and overall school performance we found that high percentages of provisional teachers in a school are associated with poor school performance.

The Department concludes that the initiatives implemented in Prince George's County have not been effective in improving the academic achievement of students in schools with high concentrations of poverty (free and reduced lunch eligible students) and predominately African American enrollment. On this account, a variety of experts — the court's Expert Panel, Dr. David J. Armor of the George Mason University Institute of Public Policy, and Dr. Samuel C. Stringfield of the Johns Hopkins University Center for Social Organization of Schools — who have examined the performance of the Prince George's County Schools agree that the system-wide initiatives have not produced dramatic improvements in student achievements. Dr. Stringfield captures the primary issue in one of his reports discussing the issues of the desegregation case.

> "Finally, although Milliken II schools have been granted additional dollars to compensate for their racial isolation, Dr. Armor does not assess what additional services these funds provide, nor how these dollars could be put to the best use. The expert panel report stated 'if they (Milliken II schools) have failed to mount an effective educational program they have failed as a remedy for desegregation.' **Thus, effectiveness of programs, not merely the fact the these schools have additional funds, is the key point**." *(Emphasis added.)*

The research on improving student achievement is clear. Students benefit from programs designed to address their specific academic needs. For example, initiatives that reduce class size without the benefit of specific programmatic intervention strategies do not result in improved student achievement. Nor do initiatives that increase resources without the benefit of specific programmatic strategies. Setting goals with measurable objectives without the benefit of carefully monitored implementation plans does not result in improved student achievement. Implementing programmatic strategies without the benefit of systematic formative evaluation systems to guide mid-course corrections does not result in improved student achievement.

There are schools in Prince George's county that have made progress towards achieving State standards. Below are three examples of schools that have made remarkable progress over the past four years: Berkshire, Seat Pleasant, and Templeton elementary schools. Faced with the difficult challenge of serving students traditionally thought of as at-risk for failure, these schools have demonstrated consistent improvement since 1993. What is apparent about these schools is that they are not all Milliken, Magnet, or Model Comprehensive schools. As Dr. Stringfield points out, it is not the presence or absence of additional resources or the source of funding, it is the effectiveness of the programs in the classroom that makes the difference. Their notes in the Prince George's County 1996 Maryland School Performance Report help us understand their successes:

Berkshire Elementary School used its additional Milliken resources in a targeted fashion based on its test scores. Early interventions for sustained future student academic success included:

☐ Reading Recovery.
☐ K-3 mathematics/science lab.
☐ an active Parent Center.

Seat Pleasant Elementary School used its additional Challenge grant resources to modify its curriculum with a focus on integrating the writing process across all subject areas. Critical characteristics of this curriculum were:

☐ authentic activities and manipulatives in mathematics.
☐ performance-based tasks as a form of assessment in all areas.
☐ use of Dimensions of Learning.

Templeton Elementary School, which received no additional system-wide or State resources, focused its improvement efforts on frequent staff development to help teachers implement strategies that:

☐ emphasize writing.
☐ integrate concepts in mathematics and science.
☐ use of computer technology integrated with classroom instruction.

Examples of Elementary Schools with Successful Student Performance

School	*Enroll.*	*Free/ Reduced Meals*	*African Am.*	*Mobility*	*Attend.*	*1996 SPI*	*Change 96-93*
Berkshire	471	67.90	98.70	54.20	93.60	42.33	17.87
Templeton	651	66.10	64.10	56.20	94.60	42.11	23.43
Seat Pleasant	581	65.40	82.40	66.40	96.60	31.96	17.89
County Avg.		41.20	71.90	34.20	95.10	46.56	10.14

From the accountability point of view, these schools are doing the job. They have identified their academic needs, targeted their resources to these needs, and, as a result, have demonstrated consistent improvement. **There is every reason to believe that these successes can be replicated throughout the system.**

The following are the essentials for managing for school improvement:

☐ Demonstrated commitment to the belief that all children can achieve at high levels.

☐ Use of a comprehensive database to assess student academic needs.

☐ Selection of research-proven intervention strategies to address priorities.

☐ Creation of detailed, school-level implementation plans.

☐ Identification of resources needed for each component of the implementation plan.

☐ Delivery of professional development to ensure appropriately trained staff for implementing the school improvement.

☐ Consolidation and deployment of resources to directly support implementation of the plan.

☐ Monitoring of implementation plan at all levels.

☐ Periodic and timely measurement of results

☐ Public accounting for school improvement efforts

SUMMARY

☐ **The level of student achievement in Prince George's County schools is unacceptable.** When student achievement is measured by the 1996 School Performance Index (SPI), elementary schools in Prince George's County account for nearly half of all schools scoring in the lowest quartile statewide (with Baltimore City excluded).

☐ **The allocation of additional funding based on school demographics, by itself, does not increase student achievement.** As a group, Milliken II schools perform below the county mean as measured by 1996 SPI for elementary schools.

☐ **Some schools DO improve student achievement through implementation of specific research-tested intervention strategies targeted for student academic gaps identified through a data-based needs assessment.** Specific programs or strategies, not categorical funding, determine student success.

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RECOMMENDATIONS:

(Also refer to **Section III: Guidelines for Developing a School Improvement Plan**, page 26.)

☐ **Conduct school-specific and systematic comprehensive needs assessments.**
The needs assessment must provide a complete analysis of data to determine contributing factors and implications for school improvement. The analysis should consider data from the most recent *Maryland School Performance Report* as well as data trends over the past several years. Data presentation should provide a profile of the school (instructional teams, grade levels, staffing); demographics (percentages of students receiving special education services, percentages receiving free or reduced meals, student mobility etc.); student achievement (disaggregated data, local and State assessment results, etc.); instructional program (content area programs, use of technology, staff development); and school climate (suspension/disciplinary data, parent/community involvement). The analysis of this data enables school level decision makers to identify the gaps in student achievement and set priorities for addressing these gaps.

☐ **Select research-proven intervention strategies.**
Once the student achievement gaps are identified through the needs assessment, strategies must be identified for bringing student achievement up to standards set by the State and the school system. The data analysis must identify the need by content, by grade, and by other means available through the use of disaggregated data.

School personnel making decisions for intervention strategies should review available research on various instructional models that address identified needs. School level personnel, in consultation with appropriate system level staff, then make decisions on the intervention strategies to be used. These strategies become the basis for the development of the action plan.

For example, the Reading Recovery Program provides a second chance for young children who are at risk of failure in their first year of reading instruction. Other programs such as New American School designs — ATLAS, Roots and Wings (Success for All), Little Red Schoolhouse, and Expeditionary Learning — provide proven instructional interventions.

☐ **Develop school improvement plans.**
School improvement plans must insure implementation of the intervention strategies selected to address the school priorities identified by the needs assessment. The improvement plans should include one year measurable objectives related to the goal, and milestones that measure progress toward the objective during specific intervals — monthly, quarterly, etc. The milestones must be measurable and closely linked to the objectives.

The school level improvement plans must integrate strategies and activities to meet instructional improvement needs for all students in all grade levels in the school. For example, the plans might identify how technology, lesson plan design, use of the media center, and supplemental activities will support the instructional interventions geared to improving student achievement. The strategies and activities must be specific; they must convey the "what" and "how" for those persons who will be implementing them.

The plans must include resource allocations and a time line with realistic start and completion dates for strategies and activities. An individual with lead responsibility for each activity must be identified.

The plans must include staff development tied to intervention strategies and activities identified to improve instruction. The staff development should include dates, activities, presenters, targeted audience, desired outcomes, evaluation, and follow-up activities.

☐ **Create a management system.**
A management system must be created to support implementation of the improvement plan. The management system should identify the activities and tasks to be accomplished by the school each month, persons responsible for implementing and monitoring those activities, the instruments to be used for monitoring, and a description of how the monitoring information will be shared with the school improvement team and other stakeholders. The management system should also include the logistical support for the delivery of staff development and a check list for the timely delivery of needed resources to the school.

☐ **Provide accountability for systemic reform.**
Ultimately, the measure of success for school improvement is student progress towards meeting State standards on MSPAP, Maryland Functional Tests, and attendance and dropout rates.

To reach this goal, schools must systematically evaluate their progress towards achieving the milestones and benchmarks delineated in their school improvement plans. Schools can't accomplish this on their own. The Prince George's County school system must provide appropriate support services to help schools meet the needs identified in the school improvement plans, such as staff development appropriate to the intervention strategies, availability of resources, and formative assessment tools. School systems are accountable for the delivery of these services to their schools.

School systems must systematically evaluate the progress of schools with special attention to at-risk students — students in poverty, students who move from school to school, students for whom English is not their native language. School systems must validate effective practices and disseminate them. Prince George's County has schools that are succeeding. The reasons for these successes need to be identified, validated and, if appropriate, propagated. There must be consequences — successes rewarded and failures sanctioned.

PROFESSIONAL DEVELOPMENT, TEACHER CERTIFICATION, AND MENTORING

AMENDING REGULATIONS ON PROVISIONAL TEACHING CERTIFICATES

The Provisional Certificate is used in Maryland as a method of certifying individuals who do not meet all of the state's teaching requirements. The Maryland State Department of Education issues provisional certificates upon requests from local school system superintendents. The provisional certificate is valid for one year, but can be renewed each year when specific conditions are met. Currently, there is no limit on the number of times a provisional certificate can be renewed. Individuals who are issued the Provisional Certificate do not qualify for professional certificates for the following reasons: 1) not meeting the state's qualifying score for the teacher certification tests; 2) not having recent credits; 3) not having completed required professional education coursework; 4) not having completed required content coursework; 5) not having completed required professional education and content coursework; and 6) not meeting renewal requirements for a professional certificate in the required time.

Since the 1992-93 school year there has been a statewide increase in the percentage of provisional certificate holders. In the 1996-97 school year, 4.7% of all certificate holders held a provisional certificate; up sharply from 1% in 1992-93.

The increased use of provisional certificates suggests a pattern that needs close monitoring. For example, Prince George's County led the State in the use of provisional certificates with nearly 13% of the school system's teacher workforce employed on this substandard certificate during the 1996-97 school year.

While provisional certificates may be necessary to address local school system hiring shortages for the short term, long term implications of employing an increasing percentage of provisional educators can seriously undermine local and State efforts to meet achievement standards set for Maryland's students. On the other hand, completely eliminating the use of provisional certificates could force many local school systems to employ a greater number of long-term substitute teachers. In most school systems, the minimum education requirement for substitute teachers is a high school diploma while *all* provisional certificate holders must possess a bachelor's degree or higher.

RECOMMENDATIONS:

The Maryland State Department of Education will seek permission from the Maryland State Board of Education and the Professional Standards and Teacher Education Board to amend regulations pertaining to provisional certificates. These amendments will address the following issues:

PROPOSED CHANGES TO PROVISIONAL CERTIFICATION REGULATION			
Issues Considered	***Current Length of Certificate***	***Number of Provisional Renewals Permitted***	***Recommended Action***
Qualifying score on teacher certification tests	one year and renewable	unlimited	Maximum of 2 provisional certificates
Six recent credits	one year	one	Maximum of 1 provisional certificate
Required professional coursework	one year and renewable	unlimited	Maximum of 2 provisional certificates
Required content coursework	one year and renewable	unlimited	Maximum of 2 provisional certificates
Required professional and content coursework	one year and renewable	unlimited	Maximum of 3 provisional certificates
APC master's credit or 36 credits Had ten years to earn credit	one year and renewable	unlimited	Maximum of 2 provisional certificates
SPC II credit or 6 credits Had three years to earn credit	one year	one	Maximum of 1 provisional certificate
Individual lifetime limit on provisional certificates	one year	unlimited	Maximum of 1 to 3 provisional certificates
Annual local school system cap	n/a	unlimited	3% of instructional staff
Annual school cap	n/a	unlimited	3% of instructional staff
MSPP Report Card	n/a	n/a	Add teacher certification data to MSPP report card

- ☐ **Not meeting the State qualifying teacher certification test score(s).** Amend the Provisional Certificate regulation to allow individuals, who have not met State qualifying scores on teacher certification tests to become eligible for a professional certificate, to hold a provisional certificate for a maximum of two (2) years.

- ☐ **Not having recent credits.** Amend the Provisional Certificate regulation to allow individuals, who do not present recent credits to become eligible for a professional certificate, to hold a provisional certificate for a maximum of one (1) year.

- ☐ **Not having completed required professional education coursework**. Amend the Provisional Certificate regulation to allow individuals, who do not present required professional education coursework to become eligible for a professional certificate, to hold a provisional certificate for a maximum of two (2) years. Qualifying teacher

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certification test scores must be submitted no later than during the second year on the Provisional Certificate.

☐ **Not having adequate content coursework.** Amend the Provisional Certificate regulation to allow individuals, who do not present required content coursework to become eligible for a professional certificate, to hold a provisional certificate for a maximum of two (2) years. Qualifying teacher certification test scores must be submitted no later than during the second year on the Provisional Certificate.

☐ **Not having completed required professional education and content coursework.** Amend the Provisional Certificate regulation to allow individuals, who do not present required professional education and content coursework to become eligible for a professional certificate, to hold a provisional certificate for a maximum of three (3) years. Qualifying teacher certification test scores must be submitted no later than during the third year on the Provisional Certificate.

☐ **Not meeting the renewal coursework requirements for the Advanced Professional Certificate in the required time although holding a Standard Professional Certificate II.** Amend the Provisional Certificate regulation to allow Standard Professional Certificate II holders, who do not present the coursework/degree requirements for the Advanced Professional Certificate, to hold a provisional certificate for a maximum of two (2) years.

☐ **Not meeting the renewal coursework requirements for the Standard Professional Certificate II in the required time although holding a Standard Professional Certificate I.** Amend the Provisional Certificate regulation to allow Standard Professional Certificate I holders, who do not present the coursework requirements for the Standard Professional Certificate II, to hold a provisional certificate for a maximum of one (1) year.

☐ **Lifetime cap on Provisional Certificates.** Amend the Provisional Certificate regulation to limit any individual to a total of one to three provisional certificates based on the limitations noted above.

☐ **Annual Local School System Cap.** Amend the Provisional Certificate regulation to limit any school system from employing no more than four (4) percent of its instructional staff on provisional certificates.

☐ **Annual School Cap.** Amend the Provisional Certificate regulation to limit any school within a school system from employing no more than four (4) percent of its instructional staff on provisional certificates.

☐ **Maryland State Department of Education Report Card.** Modify the Maryland School Performance Report to include a section on the qualifications of teachers. Each school and each local school system would display in their official State "report card" the certification of instructional staff on an annual basis.

ADDRESSING TEACHER QUALITY IN PRINCE GEORGE'S COUNTY

In the fall of 1996, two significant reports about the quality of teaching were released; one by the National Commission on Teaching and America's Future, entitled *What Matters Most: Teaching for America's Future*, and the other by the Council for Basic Education entitled *What Teachers Have to Say About Teacher Education*. Both reports make compelling arguments for raising teacher standards to ensure that every student has a caring, competent, and fully qualified teacher.

Prince George's County employs large numbers of provisional certificated teachers. Statewide, the number of provisional teachers has grown from 1% to 4.7% of the teaching workforce. These teachers lack adequate educational preparation, work with little instructional support, and are assigned to schools offering the greatest educational challenges.

In order to address these compelling teacher quality needs, two complimentary initiatives are being recommended. The first initiative is designed to address the preparation needs of provisionally certified teachers. The second initiative is developed to meet the on-going instructional support needs of teachers with less than five years of classroom experience.

Preparation Needs of Provisionally Certified Teachers

New funds will be requested for a program in collaboration with the Maryland Partnership for Teaching and Learning K-16 to assist provisional certificate holders in the Prince George's County Public Schools in obtaining their standard professional certificate. The Maryland Partnership for Teaching and Learning K-16, jointly chaired by the Chancellor of the University System of Maryland (USM), the Secretary from the Maryland Higher Education Commission (MHEC) and the State Superintendent of Schools, represents a substantive collaboration among leaders in business, K-16 education, and local and State government. This group would provide oversight for the development, implementation, and evaluation of an initiative designed to provide quality teacher preparation to provisional certificate holders throughout the State, including Prince George's County, using faculty from Maryland's institutions of higher education.

Much of this teacher preparation would be delivered in specially designed professional development schools. Success for all learners is at the heart of a professional development school. Its mission is lifelong learning within a real public school site where future teachers, practicing teachers, and college/university faculties learn together along with their pre-k through 12 students. Professional development schools promote collaboration among faculty. Practicing teachers are involved in their own professional development and become positive role models for beginning and provisional certified teachers.

The goal of this newly funded initiative is to provide a systemic approach for enhancing the quality of the teaching workforce throughout the State and in Prince George's County. This approach brings together the resources and expertise of the Maryland State Department of Education, USM, and MHEC to address the needs in Prince George's County and could serve as a model for working with other local school systems with high percentages of provisional certificate holders.

TEACHER MENTOR PROGRAM

The beginning of any professional career can pose work-related challenges to even the most adequately prepared individuals. Teachers new to the education profession are no different. Educational leaders in Baltimore County Public Schools have recognized that support of beginning teachers is an essential element to retaining a quality teacher workforce.

The teacher mentor program for Prince George's County would be modeled after the successful initiative underway in Baltimore County. The goals for the teacher mentor program would be to: 1) increase student achievement by providing instructional support to beginning teachers, and 2) retain capable new beginning teachers by enhancing their level of job performance and job satisfaction.

Prince George's County hires a large number of new teachers each year. The teacher mentor program will assist all teachers with less than five years of professional experience.

RECOMMENDATIONS:

☐ Establish a comprehensive program to assist provisionally certified teachers in Prince George's County in becoming fully certificated.

☐ Replicate the Baltimore County Public School Teacher Mentor Program in the Prince George's County Public School System and expand the use of this program statewide.

FINANCIAL AND MANAGEMENT ACCOUNTABILITY

An evaluation of the current fiscal and management operations of the Prince George's County Public Schools will provide valuable information on the school system's operations that are working well, and those that need improvement. The effectiveness of the school system management in allocating resources to schools and students, providing central office support, and investing in infrastructure to maximize the use of funds has a direct correlation to how well students perform.

The County government and the School Board have taken initial steps to audit Prince George's County Public School departments which provide administrative or management support services. On September 11, 1997, the two bodies jointly issued a Request for Proposal (RFP) for a performance audit of the Prince George's County Public School System. The Request for Proposal defines a performance audit as, "...an assessment of the Board's practices to determine whether the Board is operating economically or efficiently and whether corrective actions consistent with good business standards and practices for improving its performance are appropriate." The scope of the audit does not include an assessment or evaluation of the Board's efforts to meet the standards of the Maryland School Performance Program or of the performance of the Board's instructional programs. In addition, the RFP states that businesses which have been involved in assessments or reviews of the Board's financial statements, management practices, or operations at any time in the last ten years will not be considered by the County and the Board (e.g., Arthur Andersen LLP and KPMG Peat Marwick).

Specifically, the consultant will conduct a performance audit of the administrative organization to include all departments providing administrative or management support services. Such departments include:

1. Central offices and other offices which provide instructional or support services direction (including Executive Administration, the Division of Budget, Finance and Management, and other offices reflected in the State defined "Administration" category. The "Administration" category includes human resource services and data processing services such as systems analysis, programming, data entry, and data processing operations.).
2. Administrative Services for Risk Management, Pupil Transportation, Plant Operations, and Facilities Maintenance.
3. The Office of School Security (reflected in the Plant Operations category).
4. The Administrative Offices of Pupil Personnel Services, Student Records, and Student Concerns.
5. Student transfers which are reflected in the "Student Personnel Services" category. Activities designed to improve student attendance at school and prevent or solve student problems in the home, the school, and the community are reflected in this category.

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6. Guidance, School Psychologist, and Staff Development administration.

7. Health Services Administration (reflected in the "Health Services" category.) Physical and mental health activities which are not instructional and which provide students with appropriate medical, dental, and nursing services are reflected in this category.

8. Special Education Administrative Services (reflected in the "Special Education" category).

A complete listing of areas covered in the RFP is include in the Appendix (pages 32-33).

RECOMMENDATIONS:

☐ Submit the audit to the State Superintendent of Schools, who, in consultation with the County and the Board, shall review the audit and provide recommendations to the Task Force on implementation of the consultant's findings and/or identify areas for further review. Based on the time line included in the RFP, the draft audit report is to be submitted by March 25, 1998 and the final audit report is to be submitted by April 10, 1998.

☐ Undertake a comprehensive financial audit by an independent certified public accounting firm. The scope of this audit should include a review of the internal control structure and proper classification of expenditures. A report on findings and recommendations for improved financial accountability should be submitted to the State Department of Education and the School Board for comment and action. The Maryland State Department of Education recommends that up to $500,000 be allocated for this audit.

☐ Provide funds to address at-risk youth, limited English proficient students, and professional development provided under the Targeted Improvement Program (TIP). Prince George's County's estimated allocation under TIP is $9.1 million (see Appendix, page 31).

☐ Redirect categorical school funds currently received by Prince George County to support research-proven intervention strategies which have strong monitoring and evaluation components. These programs would enhance instruction and student performance based on results. $2 million in new State funds would be allocated for this purpose.

☐ Provide funds for a pilot integrated student support services program. These funds would support the expansion of support services to at-risk children who live in neighborhoods of poverty. Such a program should be based on a community needs assessment, follow an established service delivery model, have a strong evaluation component, and provide the State with a model which could be replicated on a statewide basis. Services could include wellness services, tutoring, social work services and/or mental health counseling. The provision of these services will be coordinated with the services provided under the local management boards.

☐ Provide funds to facilitate the attainment of professional teacher certification by provisional teachers on a statewide basis ($3 million statewide).

Funding Summary (in millions)		
Program	**Current Funding**	**MSDE Additional $**
Effective School Programs	$14.1	$2.0
TIP (Prince George's allocation)	0	$9.1
Comprehensive financial audit	0	$0.5
Subtotal Prince George's County	***$14.1***	***$11.6***
Pilot integrated student support services project	0	$1.0
Statewide Teacher Certification & Professional Development	0	$3.0
Subtotal Pilot & Statewide Initiatives	***0***	***$4.0***
Total	**$14.1**	**$15.6**

PART III:

GUIDELINES FOR DEVELOPING A SCHOOL IMPROVEMENT PLAN

MARYLAND STATE DEPARTMENT OF EDUCATION GUIDELINES FOR THE DEVELOPMENT OF A SCHOOL IMPROVEMENT PLAN

The School Improvement Plan will cover a one year period from July 1 through June 30 of the following school year. ***The plan should build on previous strategies and activities that have been implemented and provide specificity on how the school will continue to operate over the next twelve months.*** *The following elements should be included in the 1998-1999 plan:*

I. Table of Contents

II. Executive Summary (school's name should be at the top of the first page)

This section should include the following:

☐ a brief school history,
☐ demographics,
☐ discussion of school priorities,
☐ list of school goals, and
☐ synopsis of major initiatives in the action plan.

III. Glossary of Terms

The glossary of terms should include a description of all acronyms used in the plan that are school or school system specific.

IV. Vision

V. Mission and Philosophy

VI. Evidence of Need

This section should include updated/revised accurate data reflecting curriculum audit adjustments as well as the December 1997 report card and should expand upon the information provided in previous plans. Provide a complete analysis of the data to determine contributing factors and implications for school improvement. Data should be provided on the following areas:

☐ school profile (including brief information about the community)
  - describe how the school is organized for its instructional program (i.e., teams, grade level, houses, academies, other specialized grouping)
  - provide a description of the school's 1998-1999 projected staffing.

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including the administration

- ☐ school demographics
- ☐ student mobility data
- ☐ students receiving special education services
- ☐ results from curriculum audit(s)
- ☐ MSPP disaggregated data
- ☐ instructional program
    - ◆ brief description of content area instructional program
    - ◆ use of technology
    - ◆ need for staff development
- ☐ school climate
- ☐ suspension/disciplinary data
- ☐ parent/community involvement.

VII. Overview of Priorities

This section defines the school's focus based on the evidence of needs and will bridge the goals and the action plan.

VIII. Statement of Goals

This section should list school-specific goals that are clear and measurable with start and end dates. Goals should be based on priorities.

IX. Transforming the School

- ☐ Describe the instructional program. Specify how identified instructional programs will be implemented in the classroom.
- ☐ Describe how technology will be used to support the instructional program.
- ☐ Identify specific staff development training planned for the 1998-1999 school year. Describe how staff development topics relate to the needs of the school and how the outcomes will be assessed. This narrative should align with the action plan and staff development calendar.

X. Working Within the Local System

In accordance with the effective schools process, the efforts of the superintendent and other district administrators are critical in supporting school improvement. A common focus, or mission, should be evident with all system-level staff development and resource management supporting that mission. This section should include the following:

☐ a description of how the school is accessing support systems from the central office level in order to implement its plan. It should address specific school needs and how the central office is supporting, or expected to support, the school in addressing those needs.

☐ system-wide professional development activities in which the principal and other school leaders will participate and an indication of participation by school staff to date.

☐ a description of the role of central office support personnel and curricular materials that will be made available at the system level to support restructuring efforts.

XI. Action Plan

The action plan should be tied to specific identified needs (section VI) and priorities (section VII). It should be realistic with enough specificity to describe how the activity will be accomplished. Schools are expected to adjust goals and objectives based on 1997 MSPP results.

☐ **Goals**— should be for three to five years based on school needs and priorities. They must be measurable with start and end dates.

☐ **Objectives**— generally cover one school year. They must be measurable and relate to the goal. Use "from" and "to" statements.

☐ **Milestones**— measure progress toward the objective during specific intervals, i.e., monthly, quarterly, etc. They must be measurable and relate to the objective. "Administrative" activities are rarely adequate as a milestone.

☐ **Evaluation**— must be measurable and related to the objective.

☐ **Strategies/Activities**— taken as a whole, must include instructional improvements for all students in all grade levels. Examples of other strategies might include how technology will support instruction, address lesson design, use of the media center, and links with supplemental student activities. The time lines for the activities should have realistic start and completion dates. An individual should be identified with an asterisk as having lead responsibility for each activity. Activities need the necessary specificity to convey the "what" and the "how" for those who will be implementing the activities.

XII. Management System

This section should identify the activities/tasks to be accomplished by the school each month, the person(s) responsible for implementing and *monitoring* activities at the school, the instruments used for internal monitoring, and how internal monitoring information will be shared with the school improvement team and other stakeholders.

XIII. Staff Development Calendars

Staff development is a continuous process and should build on the previous training sessions. The school should provide copies of previous staff development calendars. The calendars should have dates, activities, presenters, targeted audience, and desired outcomes. If a cadre from the school is being trained, the staff development section should indicate how and when this information will be shared with other relevant staff members and what follow-up activities are planned. Training used should be linked to content area instruction whenever possible.

XIV. Budget

The budget section should document how money will be spent. The school should focus on its local budget and other grants that may be available for school improvement.

XV. School Improvement Team Roster and Signature Sheet

The name of each member of the school improvement team should be typed, then signed on the signature sheet.

APPENDIX

New Targeted Improvement Program Allocation
Fiscal Year 1999

Local Unit	Targeted Improvement Program	Non- and Limited English Proficient	Extended Elementary Education	Total Grants
Allegany	722,749	2,550	57,541	782,840
Anne Arundel	844,507	421,800	200,241	1,466,548
Baltimore City	5,761,006 *	464,700	694,491	6,920,197
Baltimore	7,134,054 **	1,198,950	100,759	8,433,763 **
Calvert	137,000	17,000	143,029	297,029
Caroline	334,496	49,900	51,770	436,166
Carroll	230,919	76,450	14,270	321,639
Cecil	358,130	27,650	162,011	547,791
Charles	445,301	76,400	144,439	666,140
Dorchester	283,985	34,900	70,036	388,921
Frederick	437,214	115,550	180,082	732,846
Garrett	305,975	0	36,312	342,287
Harford	629,207	117,300	174,311	920,818
Howard	227,265	713,900	72,500	1,013,665
Kent	115,853	40,050	55,541	211,444
Montgomery	1,641,212	7,146,050	313,759	9,101,021
Prince George's	4,931,607	3,814,150	336,226	9,081,983
Queen Anne's	101,317	21,400	59,426	182,143
St Mary's	382,796	55,300	261,134	699,230
Somerset	256,091	31,200	39,729	327,020
Talbot	91,159	32,750	20,541	144,450
Washington	669,225	171,050	103,416	943,691
Wicomico	563,530	173,000	22,541	759,071
Worcester	160,061	44,250	51,656	255,967
Total State	26,764,659	14,846,250	3,365,761	44,976,670
Competitive EEEP			1,000,000	1,000,000
Total Funds			4,365,761	45,976,670

* Baltimore City's estimated allocation represents 50% of the formula calculation total

** Creates a statewide model for the training and retention of teachers in high-risk schools which is being established in Baltimore County The amounts shown include $2 million budgeted in the Challenge Schools Program

BOARD OF EDUCATION OF PRINCE GEORGE'S COUNTY, MARYLAND
Performance Audit RFP - Exhibit B

OFFICE / PROGRAM DESCRIPTION

Budget Finance & Management - Chief Divisional Administrator
Budget
Financial Services
Internal Auditing
Management Information & Technology Services
Microfilming
Grants Development
Fixed Charges
Self Insurance - Administrative (200006)
Risk Management Fund Administration
Self Insurance - Health Administrative (880005)
Superintendent's Office
Pupil Accounting & School Boundaries
Student Transfers
Security Services
Research & Evaluation
Office of Student Appeals
Office of Special Programs
Board of Education
Outreach & Communications - Chief Divisional Administrator
Legislative / Policies & Procedures
Business & Community Outreach
Public Affairs
Personnel - Chief Divisional Administrator
Employee Relations
Employee Services
Employee Assistance
Personnel Services
Supporting Services - Chief Divisional Administrator
Purchasing Services
Warehouse
Custodial Services - Administration
Refuse Removal
Utilities
Safety
Team Energy Rebate Program
Planning, Construction, Real Estate
Administration of Facilities Maintenance

BOARD OF EDUCATION OF PRINCE GEORGE'S COUNTY, MARYLAND
Performance Audit RFP - Exhibit B

OFFICE / PROGRAM DESCRIPTION

Facilities Relocation/Reorganization Costs
Transportation Administration
Regular Transportation
Handicapped Pupil Transportation
School Activity Transportation
Central Garage Services
Food & Nutrition Services
Printing Services
Pupil Services - Chief Divisional Administrator
Pupil Services Projects
Pupil Services Clerical Pool
Student Concerns Office
Guidance Services
Guidance Services - Administration
Psychological Services - Administration
Student Records
Court Liaison
Health Services - Administration
Instruction - Chief Divisional Administrator
Curriculum & Instruction
Test Development
Before & After School Care
Magnet & Milliken Programs
Equity Assurance Programs
Student Support Programs
Special Education Administration
Staff Development

RESPONSE TO PRESENTATION MADE BY

DR. NANCY GRASMICK

STATE SUPERINTENDENT OF SCHOOLS

TO THE

SUBCOMMITTEE ON FUNDING EQUITY

SUBCOMMITTEE ON ACCOUNTABILITY

REGARDING

PRINCE GEORGE'S COUNTY PUBLIC SCHOOLS

PRESENTED ON

NOVEMBER 5, 1997

Jerome Clark
Superintendent of Schools
Prince George's County Public Schools
November 18, 1997

Introduction

Mr. Chairman and other distinguished members of this Task Force, I am Jerome Clark, Superintendent of Schools in Prince George's County. I am here today to respond to the analysis made of our school system's Community Schools Education Plan and to other aspects of our school system's operations made by State Superintendent Dr. Nancy Grasmick on November 5, 1997. Although I was very concerned at the time by the tone and tenor of Dr. Grasmick's observations and characterizations of our school system - and I still remain so - I am in significant agreement with many of the conclusions she reached in reference to the academic performance of our school system.

We acknowledge that student achievement within the system does not meet state standards, and must improve. We must, however, restate our contention made to the State Appropriations Committee on November 4, 1997, that when data are dissagregated, Prince George's County Public Schools is doing a better job of educating its students, given like demographics, than most jurisdictions in the state. More specifically, Prince George's County is doing a better job of educating students with at-risk demographic profiles than most school systems in the state. Our overall performance is impacted significantly by the disproportionately high number of at-risk students in our school system.

It is imperative that we restate our need for additional school construction and renovation to accommodate our rapidly growing population, and our need for additional staffing to reduce class size. These are priority concerns for the greater citizenry in Prince George's County, not just school system officials and employees. It is important to note, that we do not see these ongoing needs as incompatible with the majority of the recommendations offered by Dr. Grasmick in her November 5, 1997 presentation. In fact, we welcome the opportunity to work in collaboration with the Maryland State Department of Education to enhance Student Performance Accountability and implement new standards for professional development, teacher certification, and mentoring. Additionally, we concur with the general thrust of the State's Superintendent's recommendations regarding financial and management accountability. On balance, our response is one of welcoming collaboration with -- and support from -- the Maryland State Department of Education.

In returning to address this Task Force, I intend to address the following: 1) clarify our intentions with respect to the *Community Schools* document; 2) respond to Dr. Grasmick's overall assessment of our school system in conjunction with her specific observations and conclusions; and 3) share some contextual factors that we feel should be taken into consideration when both assessing the viability of our school system, and when proscribing solutions to challenges we are encountering.

I will proceed by briefly commenting on our intentions with respect to the Community Schools document, and then by providing a more detailed commentary on the analysis, conclusions, and recommendations made by Dr. Grasmick.

Prince George's County Public Schools Response To Dr. Nancy Grasmick's November 5, 1997 Presentation

Part I: Background

A. Review of Prince George's County Public Schools' Community Schools Plan

The *Community Schools Education Plan* document is a conceptual representation of how the Prince George's County Public School System would end court-ordered involuntary busing for some 11,400 students and return these students to schools in their home communities. The document was developed to articulate the school system's vision of where it would build such schools, how it would accommodate anticipated enrollment growth, and how the system would provide for the unique educational needs of students from those communities that historically have suffered from vestiges of past discrimination.

The document also articulates the school system's intention to retain the current magnet school configuration, provide compensatory resources to students from communities with at-risk socioeconomic profiles, increase resource support for non-magnet and non-compensatory resource schools[1], and identify factors that would be used by school system officials and the greater Prince George's community to determine the relative success of our school system. **In no way was the document ever intended to be a detailed, strategic educational master plan**.

The Community Schools document was developed for public consumption and to provide a broad framework within which a strategic educational master plan could be developed in consultation with stakeholders who have a vested interest in the welfare of our students. In this regard, the system is amenable to, and indeed welcomes, input from the Maryland State Department of Education or any other public entity that might assist us in improving educational outcomes for our students. *The school system feels very strongly, however, that a basic resource level — i.e., staffing in the neighborhood of a 20-to-1 student to teacher ratio and a full-day kindergarten program — must be in place for intervention strategies to impact academic achievement in a truly significant manner.* The school system feels equally as strongly that a thorough and comprehensive instructional intervention strategy along the lines of the one suggested by State Superintendent Grasmick must be developed if anticipated academic achievement gains are to be sustained over a significant period of time. To this end, we welcome the assistance of MSDE in developing such a plan.

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[1] Compensatory resource schools refer to Milliken II schools. This reference to Milliken II schools will be used so that the confusion around the nature of these schools might be clarified. Milliken II received court-sanctioned compensatory resources. ***These schools never operated under a programmatic vision***. Given the performance level of these schools since the inception of the MSPP, perhaps a uniform academic program should have been developed, imposed upon these schools, and then evaluated for its effectiveness. Notwithstanding this valid criticism, removing existing compensatory resources or dispensing with consideration of expanding the number of schools receiving such resources seems somewhat short-sighted.

B. Response to MSDE's Findings and Observations of the Vaughn's Expert Panel

The Maryland State Department of Education's review of the findings and observations of the Vaughns vs. Board of Education Expert Panel commented on the maintenance and expansion of Milliken II schools, maintenance of magnet programs, expansion of model comprehensive elementary schools, teacher and staff hiring and assignment, and evaluation and accountability systems.

As you are aware, the *Vaughns vs. Board of Education* trial began this morning, November 18, 1997, at the United States Federal Court in Greenbelt, Maryland. Therefore, it is not appropriate for us to engage in an extended discussion of the desegregation case at this time. The trial is open to the public, however, and every member of the Task Force is certainly welcome to attend any and all sessions. In lieu of extended commentary, let me simply restate the major conclusions of the Expert Panel as they appear in the report.

The Expert Panel on Desegregation appointed by Judge Peter Messitte was charged with conducting a comprehensive review of court ordered school desegregation in Prince George's County. In carrying out its task, the panel was ordered by the Judge to address four major questions:

- Has there been full and satisfactory compliance with the Court's decrees?
- Has the School Board demonstrated a good faith commitment to the whole of the Court's decrees since they were entered?

- Have the vestiges of past discrimination been eliminated to the extent practicable?
- Is retention of judicial control necessary or practicable to achieve compliance with the decrees in any respect?

Although it is not the purpose of our session this afternoon to provide a detailed discussion of the Panel's findings, it is important to highlight some of their conclusions.

First, the panel concluded that in six of the eight areas in which the court has issued decrees, Prince George's County Public Schools has substantially complied. In a seventh area, it has complied to the extent practicable, and in the final area the panel found that the system may, in fact, have done all that it could, given the circumstances.

With regard to the Board's demonstration of a good faith commitment to the whole of the court's decrees, the panel found that the Board appears generally to have done so. The panel also determined that no evidence in policy or procedures was found to link factors under investigation to vestiges of prior segregation.

The panel's report concluded with a final recommendation that, should Prince George's County Public schools be declared a unitary school district, the system should first be required to submit a plan of action for the new status. The panel further defined specific features that should be included in the plan:

- declare intentions for keeping special resources in place;
- set forth post-unitary policies consistent with these intentions;
- lay out plans for identifying the funds to continue support of programs that have been effective in achieving desegregation;
- define areas of accountability; and

- provide the design for a systematic research and evaluation program *to assure that the district continues in desegregated status. (emphasis added).*

Let me state clearly that we believe our school system should be granted unitary status. Furthermore, we take most seriously the charge of the Panel, that should the school system be declared unitary, a plan of action, or transition plan, would be needed. Like the Expert Panel, we believe special resources currently in place must remain, and funds must be identified to continue support of programs that have been effective in achieving desegregation. These resources include those currently allocated to Milliken II and Model Comprehensive schools, and to Magnet schools and programs.

We also feel very strongly that given the demographic profile of the students who would be returned to new schools in their home communities, they are no less deserving of compensatory resources than their counterparts from the same communities who happen to attend an adjacent school (i.e., a Milliken II school). Failure to extend a similar resource package to students with like demographic profiles would be tantamount to trading off the compensatory staffing resources, that currently exist in Milliken II schools - and which the Expert Panel clearly states should remain in place - for a new school building. We feel very strongly that such a trade off would be unfair to the affected students and their communities. A more prudent approach would be to replicate the compensatory resource package, or a modified version thereof, and join with MSDE to design an appropriate academic program for these schools that meet the accountability requirements articulated by the Expert Panel.

Part II: Managing for Successful Change

Section I: School Performance Accountability

State Superintendent's Recommendations #1-5

1. Conduct school-specific and systematic comprehensive needs assessments.
2. Select research-proven intervention strategies.
3. Develop school improvement plans.
4. Create a management system.
5. Provide accountability for systemic reform.

Response:

Although we interpret the performance of Prince George's County Public Schools' students in a manner that is different from that presented by the Maryland State Department of Education, it is clear that student achievement in our school system does not meet state standards and must be improved. We are in agreement with the five recommendations offered by Dr. Grasmick in her discussion of School Performance Accountability, and that are listed above.

We also agree with Dr. Grasmick that research on school improvement indicates that students benefit from programs designed to address their specific needs. Our most substantive difference with Dr. Grasmick's analysis of our situation is what appears to be an emphasis on the role of programmatic considerations in improving academic outcomes *at the expense of* compensatory resources. Just as it would not be appropriate for our school system to invest substantial resources devoid of programmatic vision and direction and a strong accountability component, so, too, is it inappropriate for MSDE to advocate for strong programmatic changes and accountability measures without supporting the need for additional resources at or similar to Milliken II levels for schools that most clearly will have student profiles identical to those in present Milliken II type schools. *We believe it is the combination of strong instructional programs, effective management strategies, clear performance and accountability targets* ***and enriched resources*** *that will make the difference for our students.*

I wish to make one final point about the role that class size plays in the academic achievement of socioeconomically at-risk children. As referenced by Dr. Grasmick, in her October 14, 1997 testimony before this task force, the literature clearly states that a class size of 15 students per classroom teacher is needed to make a measurable difference in the academic performance of students in the primary grades. The literature also states that this student-to-teacher ratio has a greater impact on at-risk children than it does on children from more mainstream socioeconomic backgrounds. The Milliken II compensatory resource model employed in Prince George's County never came close to approximating a 15-to-1 student-to-teacher ratio. Even the 20-to-1 ratio that has been employed is not a true student-to-teacher ratio. Rather it is an instructional staffing ratio that includes a library media specialist and the reading and mathematics resource teachers. In reality, actual classroom ratios in many Milliken II schools are in the 25-to-1 or higher range. Perhaps the Milliken resource investment was not sufficient to bring about a desired level of academic improvement.

Recommendation #1: Conduct school-specific and systematic comprehensive needs assessments

We are in total agreement with the importance of conducting school-specific and comprehensive needs assessments. So important is this step to us that we have invested significant resources in developing a computerized database to assist schools in accessing a wide spectrum of information about student achievement. Our READ Database has received national recognition for its capacity to provide school and student-specific data over time. The data elements included in Dr. Grasmick's recommendation are sound, and we concur with the use of each and every one of them. We particularly value the use of disaggregated data, and believe it provides much needed insight about the performance of specific groups of students. We will, however, need to upgrade our staffs' ability to analyze the data elements that would be a part of the school-by-school needs assessment.

Recommendation #2: Select research-proven intervention strategies

Clearly we support the State Superintendent's focus on selecting research-proven intervention strategies. Our school system's investment in *Reading Recovery* is but one example of such a strategy that has resulted in improved student performance. Our school system has also significantly invested in two research-based programs with the College Board, EQUITY 2000 and Pacesetter. EQUITY 2000 is premised on research that shows Algebra I and Geometry as gatekeeper courses necessary for college entry and subsequent success.

EQUITY 2000 requires all ninth grade students to enroll in Algebra I or a higher level mathematics course, and all tenth grade students to enroll in Geometry or a higher level mathematics course. Any student who does not successfully complete these two courses cannot receive a high school diploma from our school system. Prince George's County is one of the few LEAs in the state with such a requirement. Taken together with the State's requirement of three mathematics courses for high school graduation, we are ensuring that our students are receiving the level of mathematics instruction that will prepare them to succeed in increasingly higher numbers and percentages on the SAT.

Pacesetter compliments EQUITY 2000 by raising the rigor of upper level high school course offerings across the curriculum. In conjunction with our Pacesetter emphasis in a number of our high schools, advanced placement enrollments and success have improved.

It should also be noted that the Comer School Development Program is in operation in a growing number of schools in the county. However, we are not yet satisfied with the level of implementation at current Comer sites. Our intention is to substantially improve the replication of the School Development Program and rapidly expand its implementation across our school system.

We certainly welcome more extensive discussions of *best practices*. We would point out MSDE's enthusiastic support for our Action Research Program, which is designed to identify and promote such practices. We would caution, however, against citing examples of singular successes such as has been done by Dr. Samuel Stringfield in his assessment of our school system. In many cases, such singular successes are a function of a singular outstanding leader who has unusual vision and can so motivate a staff. Please note, however, that we are investing in advanced leadership training programs to ensure that all building based leaders have needed skills.

We must also be careful that the so-called *best practices* identified have proven successful in improving at-risk student performance in performance assessment environments such as MSPAP. To the best of our knowledge, most of the best practices acknowledged in the literature have been validated by student performance on norm-referenced rather than performance assessment tests. We are not aware of any such practices that have brought sustained, systemwide success to at-risk students in a MSPAP-type environment. We remain eager to work with MSDE to identify and implement any such practices.

Recommendation #3: Develop School Improvement Plans

Prince George's County Public Schools is in total agreement with Dr. Grasmick's recommendation regarding school improvement planning.. Prince George's County Public Schools was one of the first school systems in the state to require all schools to develop such plans, following the introduction of the Effective Schools Process in the 1985-86 school year. In fact, the Prince George's County Public Schools' school improvement planning model was recognized by MSDE even before the state implemented the Maryland School Performance Program with its statewide requirements for school improvement planning.

Although the school improvement planning model presented in Dr. Grasmick's recommendation is both demanding and comprehensive, we believe it is sound. Currently, we use this model for all *Challenge Schools* within our system, and believe it has the potential to help all schools.

Recommendation #4: Create a management system

We agree whole-heartedly with this recommendation, and in fact, have begun to implement such a system with our six *21st Century Schools*. Again, these are schools that we have reorganized because of their poor academic performance. We have taken three of our most successful and innovative principals and have created a management team to oversee all operations of these schools. They assist *21st Century Schools*' staff with school improvement plans, help plan staff development, and assist with data analysis. They also interact with various support offices of the school system to help ensure the timely delivery of needed resources to these schools.

At a more basic level, I have reorganized our school system into 20 *Communities Committed to Children*. Each school community, or cluster, consists of one high school, one or two middle schools, and several elementary schools that feed into the middle and high schools respectively. Each cluster is managed by a Chief Educational Administrator (CEA), who is the principal of one of the schools within the cluster. Although this management arrangement is relatively new, we feel that its potential is great because it moves to locus of decision-making away from central office and into the very communities where the impact of such decisions will be felt. We are working within our fiscal constraints to address the quality of school-based management, and we would welcome any assistance MSDE would be willing to offer in this regard.

Recommendation #5: Provide accountability for systemic reform

Prince George's County Public Schools agrees with the thrust of this recommendation. We certainly believe that the standards established for the Maryland School Performance Program are appropriate and that they establish a foundation for educational improvement. We also agree with the need for milestones and benchmarks, although our first concern is with substantial and sustained movement in a positive direction.

These standards, however, are insufficient for our school system and our community at-large. We also measure the success of our school system by student performance on the SAT, student enrollment and success in advanced placement courses, student enrollment in upper level mathematics courses, and the volume of scholarship dollars obtained by our graduating classes. With each of these indicators, we look at systemwide performance over a three year period.

We disclose MSPP data and the other indicators listed above in a series of *Full Disclosure Meetings*, which are held in every school board district in the county. These meetings are open to the general public and we provide the information on a school-by-school basis. To the best of our knowledge, no other school system in the State of Maryland, or perhaps in the entire country, discloses the type and volume of information — *both good and bad* — in the detail that we provide.

Finally, for those schools that do not measure up to our standards in the Maryland School Performance Program, our *21st Century Schools Initiative* provides the ultimate step in accountability. We redesign and restaff those schools with the lowest school performance indices which are also far from the State's MSPP standards and in decline. This year, we have reorganized the four elementary schools and the two middle schools with the lowest MSPP school performance indices. Moreover, we have notified 13 other schools, including two high schools, that they would be reorganized for the coming school year if key academic accountability indicators do not improve.

In summary, Prince George's County embraces the accountability recommendations outlined by Dr. Grasmick in the School Performance Accountability section of her report.

Section II: Professional Development, Teacher Certification, and Mentoring

State Superintendent's Recommendation #1

> **The Maryland State Department of Education will seek permission from the Maryland State Board of Education and the Professional Standards and Teacher Education Board to amend regulations pertaining to provisional certificates.**

Response:

As a school system, we share Dr. Grasmick's concerns relative to our teacher certification problems and we recognize the issues associated with our current status. There are several factors, however, that combine to give rise to our unique certification problems in Prince George's County. These factors include:

- The student enrollment explosion over the past several years;
- The failure of Maryland's colleges and universities to produce qualified teacher candidates in sufficient numbers to meet the state's LEAs' increasing demand;
- The comparatively small application pool from which the Prince George's County School System must choose teacher candidates;
- The high turnover rate of recently hired teachers;
- Inadequate teacher pay; and
- Teacher assignment constraints associated with our desegregation court order.

Student Enrollment Explosion

The first of these constraining factors is our student enrollment explosion. In the past two years alone, our school system has had to hire 2,746 new teachers to service the influx of new students, and to replace a rash of teacher and administrative retirements. By comparison, over this same time period, Anne Arundel County hired 663 new teachers, Baltimore City hired 1,836 new teachers, Howard County hired 682 new teachers, and Montgomery County hired 1,327 new teachers.

Shortage of Qualified In-State Teacher Candidates

Compounding this extraordinary need for new teachers is the documented shortage of qualified teacher candidates graduating from the state's college and universities. For example, Maryland public schools hired 4,588 new teachers during the 1996-97 school year, while the state's colleges and universities were graduating only 2,500 - 2,700 teacher candidates. This represents a candidate shortage of 2,000, which must be made up through recruitment from other states that have a surplus of teacher candidates, or by the recruitment of non-traditional candidates. At the beginning of their teaching careers, out-of-state teachers are less likely to meet certification standards established by the state than their in-state counterparts.

Comparatively Small Application Pool

In addition, Prince George's County does not have the application pool from which to choose teacher candidates as other districts do. For example, Prince George's County received 2.7 applications for each teaching vacancy this school year. By comparison, Montgomery County received almost 6 applications for each vacant position, Anne Arundel County received 7 applications per vacant position, and Howard County received 8 applications.

High Turnover of New Hires

Once hired, it is increasingly difficult to keep new teachers in the school system. Between the 1992-93 and the 1996-97 school years, some 1,415 teachers resigned from our school system. Seven-hundred sixty-five of these teachers (or 54%) were first or second year teachers. Almost as many first and second year teachers resigned from Prince George's County last year as were hired in Howard County this year. Nationally, whereas only 14 percent of teachers leave a public school district to work in another one, at least 20 percent of the teachers leaving Prince George's County did so in order to take a position in a neighboring jurisdiction or in a private school. This 20 percent figure does not include those teachers who left to take positions in another state outside the Washington, D.C. metropolitan area.

Inadequate Teacher Pay is a Major Problem

One of the primary reasons for the recent hires leaving our district is the difficulty we have had keeping the teacher pay scale as competitive as we would like. Starting salaries for Prince George's County teachers are the eighth highest in the Metropolitan Washington, D.C. area, and there is little movement on the teachers' salary schedule for several years after initial employment. We have made good faith attempts to become more competitive, but our efforts have been thwarted by the chronic precariousness of the county's fiscal situation. The fiscal situation in Prince George's County has been so tenuous up until the current fiscal year, that our County Executive and County Council had urged us not to grant even token salary increases to employees despite the impact that not doing so was having on our regional competitiveness. Our frustration in this regard is even greater when one considers the staff development and certification support provided to new teachers that we lose when they transfer to neighboring Maryland jurisdictions that can afford to pay them more.

Inadequate pay also prohibits many of our provisionally certified teachers from taking necessary college courses at a pace that would be required to further expedite their acquisition of the standard professional certificate. Comparatively low pay in a county with a comparatively high cost of living, compounded by the costs associated with accelerating college course work for certification purposes is often more than young teachers can shoulder.

The Need to Recruit and Hire Minority Teachers

Another contributing factor to the certification situation in the county is our aggressive recruitment of minority teachers. Our school system has been under a directive from the federal court since 1972 to recruit minority teaching candidates. We have also been urged by our Community Task Force on Black Male Achievement to aggressively recruit minority teachers. Approximately 37 percent of the Prince George's County teaching force is African-American. This number has increased by 690 (or 35.5%) since the 1992-93 school year. The county now employs more than 27 percent of all African-American teachers employed in the state. Many of these minority teachers, particularly African-American males, are provisionally certified.

Teacher Assignment Constraints

The final factor that contributes to the concentration of the certification problem in poor performing schools is the set of rules governing teacher assignment. On the one hand, after receiving tenure upon completion of two successful years in the school system, a teacher can apply for a voluntary transfer. Many non-minority teachers who choose to remain in our school system exercise their option to transfer away from schools with high concentrations of at-risk students. On the other hand, to the extent that minority teachers aspire to teach at schools located in socioeconomically challenged communities, they are often constrained by the court order that limits the percentage of African-American teachers in any one school building.

An Alternative to MSDE's Certification Recommendations

Dr. Grasmick has proposed several changes to the current provisional certification regulations. Prince George's County Public Schools agrees with the general thrust of these proposed changes which is to tighten the requirements. In light of our unique set of circumstances, however, we would propose several modifications to the MSDE proposal.

1. Make the provisional certificate a two-year certificate, and limit each individual to "2" two-year certificates.
2. Give each new hire two years to pass the required certification tests.
3. Beginning with the 1998-99 school year, establish a scale that would allow PGCPS to gradually lower the percentage of its provisionally certified instructional staff until the four percent state cap is met.
4. Adjust provisional certification limits in those areas identified by the state as *critical needs areas*, particularly if there is a statewide shortage in a particular critical needs area.
5. Place additional state emphasis on meeting the particular training needs of each individual school system.

State Superintendent's Recommendation #2

Establish a comprehensive program to assist provisionally certified teachers in Prince George's County in becoming fully certified.

Response:

The Maryland State Department of Education has proposed an allocation of $3 million to facilitate the attainment of professional teacher certification by provisional teachers on a statewide basis. In a recent meeting with key representatives from the University of Maryland College Park's Department of Education, it was determined that Prince George's County Public Schools would need approximately $2 million per year over the next three years to resolve its immediate certification problem. Thus, the $3 million proposed by MSDE for a statewide solution would not provide the extent of assistance we would need.

Unfortunately, this problem will not go away without dealing with the combination of circumstances that led up to the problem in the first place. Institutions of higher education in the State of Maryland consistently fail to produce a sufficient number of teacher candidates to adequately service the state's public school systems. As previously stated, the current shortfall is approximately 2,000 teachers. This shortfall is compounded by the fact that with the exception of the 1996-97 school year, a majority of teacher candidates graduating from Maryland higher education institutions took teaching positions either in private school within the state, or in a public or private school outside the state. Between FY '94 and FY '96, only 43.4%, 46.9%, and 42.1% respectively of graduating teacher candidates from Maryland higher education institutions actually took teaching positions in a state public school system. Thus, school systems like Prince George's County are forced to hire many new teachers from out-of-state.

Another critical dimension of this problem for Prince George's County is our need to hire minority teachers given the school system's 74% African-American student population. The University of Maryland attracts insufficient numbers of minority candidates into the field of education. Moreover, the university system is not doing enough to prepare both minority and non-minority teacher candidates to teach in an urban/suburban environment. Difficulty with classroom management skills is a major factor in our high attrition rate among first-and-second-year teachers.

Dr. Grasmick has proposed a program in collaboration with the Maryland Partnership for Teaching and Learning K-16. We see this as an excellent recommendation, but believe the Departments of Education in the University of Maryland System must make substantive changes in their program if Dr. Grasmick's program is to work. For example, the UM System should establish Professional Development Schools (PDS) in some of the Title I schools in Prince George's County and Baltimore City. Master teachers could then be deployed to these schools to show prospective candidates how to meet the needs of our students. We would recommend that teachers trained in a PDS commit to at least three additional years of service to the school system in exchange for tuition waivers once they attain full certification. Assuming a mutual working relationship among MSDE the University of Maryland System and Prince George's County Public Schools, this program proposal could become a model for working with other local school systems with high percentages of provisional certificate holders.

State Superintendent's Recommendation #3

Replicate the Baltimore County Public Schools' Teacher Mentor Program in the Prince George's County Public Schools System and expand use of this program statewide.

Response:

Based on information we have received from Baltimore County Public Schools, its Teacher Mentor Program, appears to be an excellent one. The program's goals are to increase student achievement by providing instructional support to beginning teachers, and also to retain capable new teachers by enhancing their level of job performance and job satisfaction. (It is important to note that a similar program exists in Prince George's County Public Schools but not on the scale proposed by Dr. Grasmick.)

The Baltimore County program speaks to two major problems Prince George's County Public Schools faces: 1) an attrition rate that is double the national average, and 2) a young teacher workforce, that in many cases, does not have the classroom management skills to work successfully with students in an urban environment.

The Baltimore County Program works with schools with the following characteristics:

- a high attrition rate
- Title 1 schools
- low student achievement levels

The 73 mentors in this program work with all teachers who have five years or less teaching experience in the 50 selected schools. Mentors are full-time, on-site and have no teaching or evaluative responsibilities. They are responsible for delivering a strong instructional and management (discipline) program that develops interpersonal relationships among faculty and one that makes use of team teaching. This three-year state/county funded program has resulted in a 39% reduction in the teacher attrition rate to date.

We believe that in Prince George's County this program should be supervised by the Office of Staff Development within the Division of Instruction. To guarantee the program's success, it would be important for the Personnel Division to add a strong mentoring program for school-based administrators in the selected schools. As indicated in the video *What Matters Most: Teaching for America's Future*, choosing mentors who have the respect of the individual faculties (true master teachers) are the key to the success of this program.

In order to support new teachers in schools where the Baltimore County Mentor Program would not be used, the Personnel Division would continue to assign individuals to work closely and on a regular basis with all first and second year teachers, and all provisional teachers.

Part II, Section III: Financial Management and Accountability

State Superintendent's Recommendation #1

> **Submit the audit to the State Superintendent of Schools, who, in consultation with the County and the Board, shall review the audit and provide recommendations to the Task Force on implementation of the consultant's findings and/or identify areas for further review. Based on the time line included in the RFP, the draft audit report is to be submitted by March 25, 1998 and the final audit report is to be submitted by April 10, 1998.**

Response:

Due in large part to decline in *real* per pupil expenditures since FY 1991, the Prince George's County Board of Education saw the need to assess the effectiveness of its use of resources. The Board sought to address this need through Resolution 578-95, which authorized the performance of a management audit. Further action on that resolution was postponed pending the outcome of legislation under consideration at that time by the Maryland General Assembly.

On January 23, 1997, Board Resolution 017-97 directed that a solicitation be undertaken in partnership with the County Government for the conduct of a performance audit or review of all administrative programs and functions supporting classroom delivery of instructional programs. Pursuant to that resolution, a request for proposal (RFP) was released to solicit services from qualified management consulting firms for the cited audit or review on September 11, 1997. The deadline for the receipt of proposals was October 17, 1997, and the joint review of all responses between staff, the Board of Education, and the County Government was concluded on November 3, 1997.

As indicated above, the review of proposals was completed on November 3, 1997. The next step in the process is the joint selection by the Board of Education and the County Government of the vendor that will conduct the audit/review. This will require a review of the scope of the project within the fiscal and time constraints identified for its completion.

The Board of Education and the Superintendent welcome the opportunity to share with the Maryland State Department of Education (MSDE) the report of findings and recommendations resulting from the performance audit that will be conducted as a joint initiative between the Board of Education and the County Government. Similarly, the Board of Education and the Superintendent are prepared to work in partnership with the MSDE to review the recommendations from the audit and to develop initiatives for the implementation of such recommendations, as well as identifying other areas suitable for further review.

It should be noted that although the RFP specified an anticipated timeline for the completion of this project, it included a caveat that all dates were tentative and subject to change. Since the proposed date for the final report was based on a final selection and contract award by October 31, 1997, it is very likely that the report availability will be after the April 10, 1998 date indicated in the RFP.

State Superintendent's Recommendation #2

> **Undertake a comprehensive financial audit by an independent certified public accounting firm. The scope of this audit should include a review of the internal control structure and proper classification of expenditures. A report on findings and recommendations for improved financial accountability should be submitted to the State Department of Education and the School Board for comment and action. The Maryland State Department of Education recommends that up to $500,000 be allocated for this audit.**

Response:

I could not discern from the State Superintendent's November 5, 1997 presentation before this body the rationale for this recommendation. Pursuant to

Section 5-109 of the Education Article of the Annotated Code of Maryland, as implemented by Sections 13A.02.07.03, 13A.02.07.04, and 13A.02.07.05 of the Code of Maryland Regulations (COMAR), the Board of Education engages a certified public accounting firm each year to perform independent audits of the Board's financial transactions and accounts, including those related to Federal Financial Assistance Programs. The selection of the audit firm is subject to approval by MSDE and copies of the financial report and accompanying audited financial statements are submitted to MSDE for review.

To the best of my knowledge, MSDE has never raised any concerns about the financial operations of the Board of Education. By definition, financial audits consider (for the purpose of determining the nature, timing, and extent of audit procedures) the internal control structure of auditees. Such consideration is a review, and is not considered sufficient to render an opinion on the effectiveness of the internal control structure over financial reporting. Audit reports do include any significant internal control deficiencies noted during the conduct of the audit, however.

For at least the past 18 years, including and up to the Fiscal Year ending June 30, 1997, the Board has received unqualified ("clean") opinions from the independent audits conducted by the accounting firm of Arthur Andersen LLP. The reviews performed by MSDE under the regulations cited above have not uncovered any signs of irregularities in the financial activities of the Board during the same period. For 16 of its 18 submissions, the Board has been awarded the coveted Certificate of Achievement of Excellence in Financial Reporting by the Government Finance Officers Association of the United States and Canada (GFOA). This prestigious award is presented to governmental units which successfully withstand rigorous scrutiny of their financial reports measured against generally accepted accounting principles and standards set by the Government Accounting Standards Board and the GFOA.

The Board of Education welcomes any initiative that will help determine and assess the effectiveness and efficiency with which its resources are managed. However, in view of the facts described above regarding the Board's annual financial audits, and particularly in the absence of any concerns raised by MSDE through its legally mandated oversight capacity over the years, it seems that the expenditure of resources to the magnitude proposed in the State Superintendent's recommendation would not be cost effective. Since FY 1993, the Prince George's County Board of Education has spent between $91,000 and $95,000 annually to have the audit of its financial operations conducted.

If it is determined that additional review of Board of Education financial operations is in order, an alternative course of action would be to expand the scope of the annual financial audit to include areas not presently audited or planned for assessment, but identified in the State Superintendent's recommendation. Another option would be for MSDE to support the Board/County effort already in progress that was referenced in our response to recommendation #1 of this section. The fiscal resources initially identified by the County government and the Board of Education may not be sufficient to cover the cost of a performance audit of this expanded scope.

A more fiscally prudent approach would be to redirect the funding identified in this recommendation to expand the scope of both the performance audit that will be soon underway, and the Board's annual financial audit for the period ending June 30, 1998. An expanded financial audit could target the Board's internal controls structure and expenditure classifications for comprehensive review.

State Superintendent's Recommendation #3

Provide funds to address at-risk youth, limited English proficient students, and professional development provided under the Targeted Improvement Program (TIP). Prince George's County's estimated allocation under TIP is $9.1 million

Response:

The Board of Education and Superintendent welcome the recommendation that will provide an additional $9.1 million to benefit the students of Prince George's County schools. As outlined by Dr. Mark Moody, Assistant State Superintendent, in his November 10, 1997, presentation to this Task Force, the TIP initiative is predicated upon several conditions including:

- Funds get budgeted within the context of comprehensive school improvement plans;
- Implementation plans must consolidate multiple funding sources;
- Funding must support implementation of research-proven strategies to improve achievement of the targeted population;
- Interim measures must be reported both semi-annually and annually to monitor the impact of the selected interventions; and
- Summative measures, based on MSPP variables, must be used to assess the efficacy of the intervention strategies.

Although we think that the conditions established by MSDE for the use of funding associated with the TIP initiative are generally sound, we are somewhat concerned about the scope of the "research-proven strategies requirement." We are not sure that such strategies have been reliably documented in a performance assessment accountability context. As such, Prince George's County, and other school districts that have significant at-risk student populations, should not be restricted to the selection of only those strategies that have been tried elsewhere under conditions that might not be comparable.

Another part of the proposal on which we wish to comment is the contemplated creation of an MSDE student database which would provide a reliable student classification system that links demographic variables with student achievement measures. Such a database also would provide a reliable student tracking system which would record student level achievement, demographic data, and information regarding student eligibility for special services. The creation of such a system would give MSDE the capacity to determine the independent effects that demographic, systemic, and school-based factors have on academic achievement. Currently, MSDE does not have this analytic capability.

Prince George's County would welcome MSDE officials to examine our READ System that was developed with the assistance of the College Board. Our READ System is a relational database system similar to the one contemplated by MSDE. We have found this kind of database system to be very useful in identifying factors that either contribute to or detract from student achievement. We would also be willing to have our Office of Research, Evaluation, and Accountability discuss with MSDE officials how such a system might be developed.

State Superintendent's Recommendation #4

Redirect categorical school funds currently received by Prince George's County to support research-proven intervention strategies which have strong monitoring and evaluation components. These programs would enhance instruction and student performance based on results. $2 million in new State funds would be allocated for this purpose.

Response:

To the extent that this recommendation references the $14.1 million of state aid that currently supports Magnet Programs, as well as Milliken II and Model Comprehensive Schools, I would strongly recommend against implementing this recommendation because I believe it would fundamentally undermine our efforts to acquire a declaration of unitary status from the Court in our current desegregation case. The faithful execution of the terms and conditions of the *1985 Memorandum of Understanding* and the effectiveness of the designated remedies in desegregating our school system appear to make it likely that the judge will rule in favor of unitary status. The consistent funding of these remedies by State and local sources will undoubtedly be an important consideration for the judge in reaching a final decision. Any indication that the school system might retreat from what has proven to be *effective desegregation strategies*, particularly given the recommendation of the court-designated panel, could jeopardize our efforts.

On the other hand, that this recommendation references the use of Title 1, Targeted Poverty, or TIP funding, it is most certainly appropriate.

A genuinely productive use of an additional $2 million would be to establish an internal, systematic formative evaluation system. Such an evaluation system could help us to better target our staff development efforts. Program evaluation and monitoring are important considerations, and our staff development plans must be designed to help answer basic questions such as: (1) "How do we know if the content and strategies introduced in specific teacher training programs are actually being used in the classroom?" and (2) "Do these specific training approaches and strategies being used in the classroom produce the intended results, and how do we know that it is these strategies that are producing the results?"

I, along with the Board of Education, embrace every opportunity to work with MSDE officials to improve student outcomes. Such a partnership cannot help but to enhance the lives of students.

State Superintendent's Recommendation #5

> **Provide funds for a pilot integrated student support services program. These funds would support the expansion of support services to at-risk children who live in neighborhoods of poverty. Such a program should be based on a community needs assessment, follow an established service delivery model, have a strong evaluation component, and provide the State with a model which could be replicated on a statewide basis. Services could include wellness services, tutoring, social work services and/or mental health counseling. The provision of these services will be coordinated with the services provided under the local management boards.**

Response:

We recommend that the Yale School Development Program be enhanced and expanded to fulfill this suggestion by the State Superintendent. The Yale School Development Program (SDP) is a comprehensive, process-driven approach to school and community transformation that already has an established delivery system. Its design, developed by Dr. James Comer of the Yale Child Study Center, galvanizes a school community around what is in the best interest of children. Yale University is firmly supportive of this model, and staff members from the Yale Child Study Center are readily available to work with PGCPS. This model is being replicated across the nation.

The Yale School Development Program is recognized nationally as a significant child-centered program to deliver primary and supporting services to children and families. A formal partnership has been signed between Prince George's County Public Schools and Yale University to establish PGCPS as the regional training site for the expansion of SDP.

The SDP design represents the best kind of interaction between theory, i.e., what we know about the development of human potential, and practice, i.e., the complex reality of day-to-day schooling. The Yale University program builds a more complete picture of the child, the learner, and the learning context. By looking at the expanded context of a school and its surrounding community, it profoundly changes the way instruction is delivered and the development of human potential as well.

The focus in the Yale SDP is on building an inclusive school community where all major stakeholders have a voice in significant decisions about children. The model includes a School Planning and Management Team as a governance vehicle and a Student Staff Support Team as a mental health component. The model includes an assessment of community and school needs which are incorporated into an annual School Improvement Plan. The Plan clearly delineates objectives, persons responsible, timelines, milestones, and measures of effectiveness. The School Planning and Management Team can assess the need for possible additional supporting services such as wellness services, tutoring, social work services and mental health services.

I would recommend utilizing the Commission for Children, Youth, and Families (Prince George's County Local Management Board) as the vehicle to coordinate services from other governmental and non-profit agencies that can assist the school system in the avoidance of fragmented and/or duplicated services. This initiative has already been underway for the 1997-98 school year with my request to the County Executive to appoint a new representative to the LMB from the Prince George's County Public Schools.

Efforts are going forward as well with the Police Department and other local agencies to establish a coalition of community services to better support the needs of our children in the "HOT SPOT" communities initiative. This initiative can become an enhanced part of the coordinated efforts for at-risk communities through the Yale SDP and the liaisons on the local management board.

Collaborations are also showing results from the partnership between PGCPS and the Department of Juvenile Justice in providing services to youth at-risk within the school system's cluster model. The State Department of Juvenile

Justice is expanding our newly created model in other school districts across the State because of its success in PGCPS. These programs serve youngsters placed at-risk by a number of environmental factors, including poverty and transiency.

State Superintendent's Recommendation #6

> **Provide funds to facilitate the attainment of professional teacher certification by provisional teachers on a statewide basis ($3 million statewide).**

Response:

The Board of Education and Superintendent welcome the prospect of receiving additional state aid to facilitate our existing efforts to reduce the number of our teaching staff holding provisional certificates. The Department of Staff Development of Prince George's County Public Schools currently provides on-going courses for teachers in preparation for the National Teachers Examination (NTE), special needs training, reading, and technology. These courses are provided to teachers for a nominal fee.

Part III: Guidelines for Developing a School Improvement Plan

State Superintendent's Recommendation

The State Superintendent has outlined a 15 step process for the development of School Improvement Plans. These 15 steps include:

I Table of Contents
II Executive Summary
III Glossary of Terms
IV Vision
V Mission and Philosophy
VI Evidence of Need
VII Overview of Priorities
VIII Statement of Goals
IX Transforming the School
X Working Within the Local System
XI Action Plan
XII Management System
XIII Staff Development Calendars
XIV Budget
XV School Improvement Team Roster and Signature Sheet

Response:

Prince George's County Public Schools concurs that this model for school improvement planning is thorough, demanding, and engages all stakeholders involved with the school in the planning process. This model currently is used in the Prince George's County Public Schools' Challenge Schools, and we believe it is an appropriate model for all schools.

In closing, let me take this opportunity to thank the Task Force for allowing me to respond to the State Superintendent's November 5, 1997 presentation. As I indicated at the beginning of my presentation, I remain concerned about the tone and the tenor of that presentation, however, I agree with most of its substance. I urge you to carefully consider the information we have provided for you this afternoon, and keep in mind that we are eager to establish an expanded partnership with the Maryland State Department of Education. Through collaboration and partnership, we can further the interests of children.